

**AGENDA****HORIZON Management Team Meeting**

Wednesday 3 March 1999

9:30am to 11:00am Conference Room 1 Terminal House

**Attendees** John Meagher  
Richard Gaze  
Andy Radka  
Janet Topham  
Mark Kelly  
Bruce McNiven  
Andrew Simpkins  
Bob Burkin (notes)

**Chair** Dave Miller

**Purpose** *To ensure the HORIZON Programme is fully scoped, planned and managed to deliver in all areas. To monitor the delivery of HORIZON within the agreed Programme timescales and ensure that issues are resolved and risks are managed.*

Please find attached the outstanding actions from the HMT meeting held on 24 February. A list (ref. nos. only) of the actions deemed 'cleared' by the HMT is below for completeness. These are not included on the outstanding action list.

This HMT meeting follows a progress cut-off / planning update and will focus on Team performance and planning exceptions.

An 'HMT pack' consisting of narratives from each HORIZON Team and supporting projects, an exception report and 4 week look ahead (plan) will be issued electronically to HMT members prior to the meeting.

Item	Purpose	Lead	Time
1 Welcome	Introductions and confirm purpose of meeting.	DWM	9:30 - 9:35
2 Actions	To report progress / status of all outstanding actions.	All	9:35 - 10:20

**AGENDA**

**HORIZON Management Team Meeting**

Cont.

- |   |                |  |     |               |
|---|----------------|--|-----|---------------|
| 3 | Performance    | To note Teams performance against the IPP Level 1 Plan - identifying exceptions / variances. | All | 10:20 - 11:05 |
| 4 | AOB            | To discuss any additional relevant business.   | All | 11:05 - 11:20 |
| 5 | Communications | Identify what needs to be communicated.  | DWM | 11:20 - 11:25 |
| 6 | Review         | Review meeting and identify improvements in the meetings process.                            | DWM | 11:25 - 11:30 |

Action status and new actions only to be recorded at the meeting.

Please note that the presentation on Operational Business Change planned for the HMT meeting on 3 March has been postponed. Now expected to be taken at the HMT on 17 March.

Apologies none received

**Bob Burkin**  
**Planning Team**

GRO

**Actions deemed cleared by HMT at meeting on 24 February 1999:**

01/19-42	10/00-6
01/13-34	01/06-30
12/16-24	02/03-2
01/26-48	11/19-2
01/26-46	10/00-8
10/00-4	01/19-37

# Managing the Live Trial

HMT

24th February 1999

## All areas are involved in Live Trial

- POCL - network, TP, OPG, CEC etc
- Horizon - Release Mgt, Implementation, Service Mgt, Testing, Communications, PMO
- Pathway
- BA/CAPS

*There is no one person panacea for success*

## All areas have responsibility for:

- Planning their activities
- Acquiring and allocating resources
- Gathering evidence/information
- Evaluating evidence
- Resolving issues
- Managing risks
- Communicating status
- Managing their role in the Live Trial

*But we need an integration and communication role*

## Integration and Communication

- Agreed with DWM that Release Mgt steps up to this role
- Programme Manager appointment will allow AS and team to focus on this area
- Important to link this activity with the RAB & Acceptance processes
- Also important to utilise Release Mgt contacts with BA, POCL and Pathway
- But needs to be complemented by greater POCL Operations Network engagement

## Release Management 'Live Trial Manager' Role

- Define the top-level plan (in consultation)
- Gain endorsement of the plan
- Control change to the top-level plan
- Facilitate Programme issue resolution
- Manage RAB reporting/evaluation process
- Lead Horizon/POCL/Network forum to manage system & conformance issues
- Assist DWM and team in communications with POCL, BA and Pathway

## POCL Live Trial Forum

- Operations Network
- TP
- TIP
- Service Management
- Implementation
- Release Management

Plus formal links into Pathway, BA/CAPS, and Acceptance and report up to JAB and RAB (as well as line mgt)

## Current Live Trial Issues

- How will Horizon set criteria and manage perceptions in POCL and BA ?
- Can all areas maintain focus on Live Trial and on preparing for NRO ?
- Do we 'add offices' without acceptance ?
- How do we manage the 'daily' summaries and other flows re progress and incidents ?
- How do we assure system changes ?

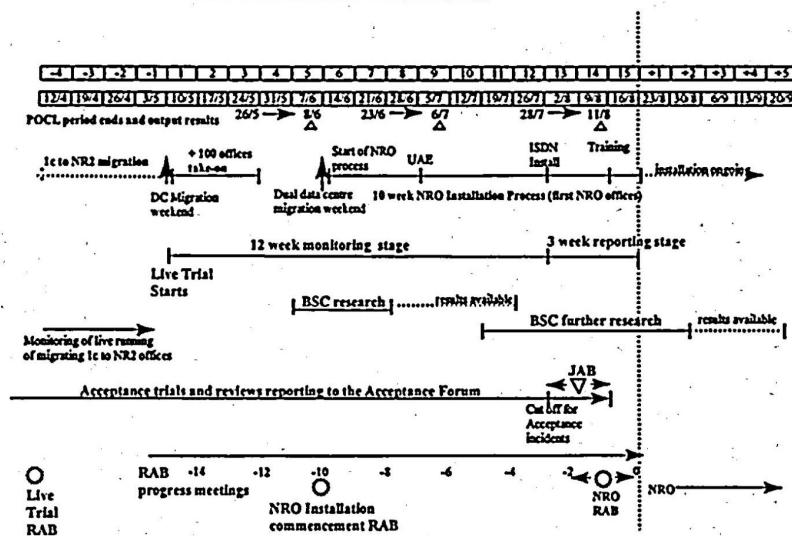
## Risks

- Delay in contractual acceptance
- Negative user/network/customer buy-in
- Inadequate user competency and training
- Office migration problems
- Too many reconciliation errors (offices/TP)
- Emergence of new/changed requirements
- Service mgt - volume/complexity of calls
- Pathway service resilience

## Next Actions

- Communicate the top-level plan by 5 March
- Follow up Live Trial Workshop actions - progress report this week
- Establish cross-POCL/Horizon forum
- Establish overall criteria (inc. RAB)
- Agree overall management arrangements and reporting flows and content
- Gain assurance on resources/responsibilities from all areas

Live Trial Timeline - revised 23/2/99



Horizon Management Team Meeting

Summary & Status of Actions

Date: 24 February 1999

Number	Subject Area	Action	Lead	Status	Action - Review on
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10/00-1.	Cross Programme responsibilities	Horizon Management Team agreed that Horizon Team and Automation Process Group need to work together and that representation is required on the APG.	John Meagher	17/2	<p>1) Dave Miller and Naresh Mohindra met with Dave Smith to discuss concerns around responsibilities and outputs in his area.</p> <p>2) Terms of reference on the definition and development of Programme boundaries have been agreed and issued to HMT members.</p> <p>This is now being taken forward by Tim O'Leary. John Meagher to provide feedback to the HMT.</p>	<p>RAB →</p> <p>O'Leary.</p> <p>Naresh.</p> <p>3 Mar</p> <p>Y MR 200</p> <p>N</p>
02/10-4	Cross Programme responsibilities	Pathway Release NR2 - concern that the POCL decision making process to support the Release Authorisation Board will be inadequate to reach agreement. [Risk 0031 refers]	John Meagher	24/2	John Meagher to arrange meeting with Dave Miller, Dave Smith and Ruth Holleran to decide how decision making / consensus will be achieved for the Release Authorisation Board.	3 Mar
02/10-2	Implementation - Office Migration	Concern at Pathway progress on the development of strategy and tools for in-office migration.	Bruce McNiven	24/2	<p>1) MiECCO operating satisfactory. No adverse impacts on MOT.</p> <p>2) Pathway unable to build training rig therefore HFSO training at risk. A dry run planned for 15 March but remains critical for start of Live Trial. Bruce McNiven to continue to review and escalate as necessary.</p>	17 Mar

Horizon Management Team Meeting

Summary & Status of Actions

Date: 24 February 1999

Number	Subject Area	Action	Lead	Status	Action - Review on
10/00-5.	Implementation - Office Migration	<p><i>Agreed</i> that there was a need to know what the procedures are in an office before automation and the automated environment (before and after). This work to be done in consultation with Ruth Holleran, John Meagher, Bruce McNiven and David Essex. Andy would commission any work required following on from this from David Essex.</p>	Dave Miller / Andy Radka	24/2	
				<p>1) A baseline is being established by Service Management to measure the procedure requirements ('before &amp; after' automation). This is now being dealt with as Business as Usual.</p>	
				<p>2) A Conformance paper is to be issued to the CEC on 1 March. Feedback to HMT by Andy Radka</p>	3 Mar
				<p>3) Concerns have been raised about deficiencies in the User Guides both in quality and content. Possible impact on MOT sign-off.</p>	
				<p>John Meagher to be asked to see what can be done to improve the content and report to the next HMT.</p>	3 Mar
				<p>Bruce McNiven to look at quality improvements and report to the next HMT</p>	3 Mar

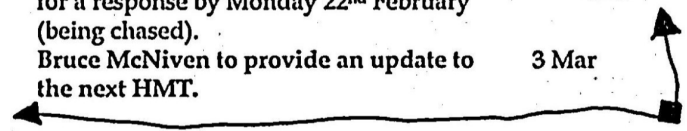
Horizon Management Team Meeting

Summary & Status of Actions

Date: 24 February 1999

Number	Subject Area	Action	Lead	Status	Action - Review on	
12/16-17	Implementation - Reference Data	Reference Data 4) As each outlet comes on line a check needs to be made that the Reference Data is in synch with the database; migration & m. testing needs to address.	Geoff Darby Bruce McNiven	24/2	Geoff Darby has put forward a proposal to carry out an additional review of local reference data at 100 outlets in each of the seven regions. This will provide a more accurate view of local products such as bus tickets where the greatest outstanding discrepancies are believed to remain. This proposal has been put to the seven regions for a response by Monday 22 <sup>nd</sup> February (being chased). Bruce McNiven to provide an update to the next HMT.	3 Mar
11/05-2.	Implementation - Roll-out	Pathway have asked for the firebreak option in roll-out to be discussed further : <ul style="list-style-type: none"> <li>target should be roll-out to 1175 office in first six weeks</li> <li>rate of roll-out and how a firebreak may assist in managing risk is the area for discussion.</li> <li>See also action 44 - Multi-benefit cut-off point.</li> </ul>	Andrew Simpkins	24/2	Meeting held with Pathway on 4 February to discuss the proposal considered a more cautious approach to National Roll-out and the logistics to support it. Douglas Craik and Pathway to build a model based on the discussions, with a further meeting to discuss the results to be held on 24 February. ✓ Andrew Simpkins to update HMT	3 Mar

Andy  
See in  
relat. to 08C.



Horizon Management Team Meeting

Summary & Status of Actions

Date: 24 February 1999

Number	Subject Area	Action	Lead	Status	Action - Review on
10/00-7.	Implementation - Transitional Arrangements	<p>Implementation and Service Management Transition and Handover arrangements need to address the following points :</p> <ol style="list-style-type: none"> <li>1) Quantification of Operational impact of going live and rolling out (i.e. what is the impact of each set of outlets on the relevant Help desks and other business support arrangements) Implementation. &amp; Business Service Management Workshop of 11 November identified need for Volumetric Sensitivity analysis to identify critical load points &amp; scenarios.</li> <li>2) Horizon impact on POCL Key Performance Indicators.</li> <li>3) Fully scope and plan in detail the transition between Implementation and Service Management.</li> <li>4) Define 'Go-Live' in an outlet.</li> <li>5) Specify Support Environments during Implementation &amp; Handover of an outlet (Implementation &amp; Business Service Management Workshop of 11 November identified need).</li> </ol>	Bruce McNiven	24/2 Naresh Mohindra met with Network Operations on 23 February re the ownership of requirements. Actions arising are being progressed.	10/3

*Transfer ownership*

Horizon Management Team Meeting

Summary & Status of Actions

Date: 24 February 1999

Number	Subject Area	Action	Lead	Status	Action - Review on
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01/26-47	Programme Management	Business Service Management business case approval submissions to COMPEC & MaPEC in early February are critical to Business Service Management programme.	Andy Radka/ Dave Miller	24/2	Business Service Management passed by CoMPEC and to go to MaPEC mid March. Andy Radka to provide feedback to HMT/	24 Mar
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02/10-1	Programme Management - Acceptance	Ongoing delay to agreement of BES Acceptance Specification: BES / PAS Boundary issue: POCL risk disproportionate to their share of liability with BA. [Risk 0068 refers]	John Meagher	17/2	John Meagher met Mena Rego and Keith Baines on 16 February. Mena Rego agreed to take this forward for agreement based on Pathway's view of where the boundary lies, providing the Contract is brought into line to reflect this. Mena will prepare the formal proposal with input from John Meagher. Dave Miller to write to George McCorkell.	
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The acceptance specification has not yet been signed-off but is being brokered by John Meagher.

John Meagher to report back to the HMT on overall progress / status. 3 March



letter gone

Horizon Management Team Meeting

Summary & Status of Actions

Date: 24 February 1999

Number	Subject Area	Action	Lead	Status	Action - Review on
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01/06-33	Programme Management - Government Review	HMT agreed that the continued absence of a clear Treasury /Government decision was impacting the programme. This impact would start to become apparent from the end of January. This was seen to be particularly the case when dealing with Post Office & POCL activities outside the programme e.g. SSL;	Dave Miller	24/2	<p>1) HMT agreed that a clear statement of intent was required from the PO &amp; POCL executive by end of January in order to underpin the continued expenditure and sense of urgency within the business in support of the programme.</p> <p>2) Dave Miller to meet with all HMT members during February on need to move to new organisation in March regardless of Government decision.</p> <p>3) Dave Miller and Bruce McNiven have discussed the communication plan with Rob Durrant. Actions being progressed.</p> <p>Dave Miller to provide overall status statement to HMT.</p>	3 Mar
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Horizon Management Team Meeting

Summary & Status of Actions

Date: 24 February 1999

Number	Subject Area	Action	Lead	Status	Action - Review on	
02/03-1	Programme Management - Responsibilities	It was agreed that the role of the Business Assurance Team lacks clarity from a Horizon perspective and difficulties are arising as a result. In particular the authority of some individuals and the processes which will operate between teams is unclear.	Dave Miller	24/2	<p>1) Meeting between Dave Miller, Janet Topham, John Meagher and Bruce McNiven held.</p> <p>2) Janet Topham has issued a paper to Dave Miller. Comments awaited.</p> <p>3) Tim O'Leary to report at end of February on boundary issues.</p> <p>Dave Miller to provide overall status statement to HMT.</p>	<p>3 Mar</p> <p><i>Shirley would see O'Leary.</i></p>
01/26-43	Programme Management - Working Practices	HMT to consider what improvements are needed in the practices with BA.	HMT Members	24/2	<p>Improvement opportunities identified were:</p> <p>1) John Meagher to arrange a presentation on the HORIZON HMT to BA CAPS (PET).</p> <p>2) Andy Radka to consider holding a joint workshop / awayday for Service Management Teams.</p> <p>3) Andy Radka to look at opportunities for exchanging staff between HORIZON and CAPS Service Management Teams.</p> <p>Progress on initiatives to be reported to HMT.</p>	<p>3 Mar</p>

Horizon Management Team Meeting

Summary & Status of Actions

Date: 24 February 1999

Number	Subject Area	Action	Lead	Status	Action - Review on	
12/23-27	Programme Management - Working Practices	HMT members to identify Pathway areas for improvement.	HMT Members	17/2	Janet Topham reviewed proposals received and issued to Dave Miller. Dave Miller to provide feedback to HMT.	3 Mar
01/19-39	Programme Plans	NR2+ E2E design not now expected to complete until end February/week 1 March.	John Bruce	26/1	Joanne White and John Bruce have reviewed the Pathway Handshake Milestones and Joanne White is responding to Pathway. Andrew Simpkins to report progress in this area to the HMT.	3 Mar
01/19-40	Programme Plans	Need to develop a communications plan for NR2+	John Bruce/Mark Kelly	19/1	John Bruce & Mark Kelly to meet to review.	3 Mar
01/19-41	Programme Plans	NR2+ Test Strategy to be developed; this will require input from Product Assurance and Release management.	Richard Gaze	26/1	Agreed that Testing would lead this. Testing to provide High Level Test Plan for end March. Richard Gaze to report progress.	30 Mar
02/03-3	Programme Resourcing	Following Star Chamber there will need to be a reappraisal of Programme budgets.	Dave Miller	17/2	Budget allocation expected on 25 February. Dave Miller to provide feedback to HMT	3 Mar

*Board 3 week handsh.  
delimites 19 weeks by  
mid-March.*



*\* resched*

*Further 15%*

Horizon Management Team Meeting

Summary & Status of Actions

Date: 24 February 1999

Number	Subject Area	Action	Lead	Status	Action - Review on	
11/19-6	Programme Resourcing	<ul style="list-style-type: none"> <li>• Additional PC Support required</li> <li>• Competence of IT Support Staff to be reviewed</li> <li>• IT SLAs to be reviewed</li> <li>• Facilities support arrangements giving cause for concern - arrangements &amp; staffing to be reviewed.</li> </ul>	Jan Topham	24/2	<p>Terminal House. Move to Greville St. Confirmed. Target is June/July. Details to be confirmed with John Denham.</p> <p>Jan Topham to pursue if there is an option to remain in Terminal House (until any problems with servers etc. have been resolved).</p> <p>Important not to overlook the Implementation Staff (approx. 20) currently working outside Terminal House.</p> <p>Janet Topham to provide updates to HMT.</p>	10 Mar
02/24-3	Programme Resourcing	Concern was expressed regarding the possible loss of key Programme staff.	Bruce McNiven	24/2	Dave Miller to raise to the next HORIZON Board the issue of staff shortages and the 'poaching' of HORIZON staff by other Business Units.	24 Mar
02/10-3	Release Assurance	Lack of visibility of the Pathway design : Pathway unwillingness to provide access to design documentation [Risk 0005 refers]	John Meagher	24/2	Pathway have not commented on Horizon concerns. Dave Miller to press Mike Coombs for a response.	3 Mar
01/19-38	Release Assurance - NR2+	Business Owner for NR2+ Product Requirements to be established.	Dave Miller	24/2	Andrew Simpkins and John Meagher to clarify this action and decide if still valid. If yes, action to be identified and agreed.	3 Mar

Horizon Management Team Meeting

Summary & Status of Actions

Date: 24 February 1999

Number	Subject Area	Action	Lead	Status	Action - Review on	
01/26-44	Release Management	Cut-off point (or 'drop-dead' point) needed for Multi-Benefit start date. Needs to be addressed at the Firebreak workshop.	Andrew Simpkins	24/2	No action possible until issues with BA on the multi-benefit start date can be resolved. Andrew Simpkins has spoken to Vince Gaskell and CAPS are expected to propose a way ahead which will retain the multi-benefit MOT start date of 12 April.  Andrew Simpkins to progress and confirm the latest date this year (1999) that CAPS could start multi-benefit Live Trial.	3 Mar
02/24-2	Release Management	Andrew Simpkins to assume the role of Live Trial Manager (Stage Manager).	Andrew Simpkins	24/2	1) A paper on 'managing the Live Trial' was presented to the HMT on 24 February. Andrew Simpkins to present the paper to John Main.  2) HMT members to identify who would represent them at the POCL Live Trial Forum to be set up (from Service Management, Implementation and Release Management). Andrew Simpkins to be informed.	10 Mar 10 Mar
02/24-1	Business Service Management	A recent proposal by Pathway may result in no Help Desks being available during initial roll-out. This will mean that there will be no Help escalation path.	Bruce McNiven	24/2	This potential issue is being taken up with Pathway. Bruce McNiven to report outcome.	3 Mar
02/17-1	General	To consider a 'dressing down' day once a month when 'smart but casual' wear would be acceptable.	John Meagher	17/2	Janet Topham to arrange.	3 Mar

*Data migration*

Horizon Management Team Meeting

Summary & Status of Actions

Date: 24 February 1999

Number	Subject Area	Action	Lead	Status	Action - Review on
02/17-2	General	To avoid embarrassment over possible security breaches consideration to be given to producing a 'pack' with basic guidelines to be followed.	John Meagher	17/2 Janet Topham to consider what can be produced and by whom.	3 Mar ✓

**Lilley, June**

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**From:** Burkin, Bob  
**To:** Radka, Andy SM PROJECT; Kelly, Mark; McNiven, Bruce; Meagher, John; Miller, Dave (Horizon); Simpkins Andrew (internet); Richard Gaze; Topham , Janet(general)  
**Cc:** Brazear, Dick; Meszaros, Eszter; Robinson, Lucy; Barnard, Marisa; Smith, Avila; Lilley, June  
**Subject:** For HMT 3 March 1999  
**Date:** 26 February 1999 16:08

All,  
Attached is the Agenda for Wednesday's HMT meeting plus updated actions. The HMT 'pack' will be issued on Monday.

Also attached (in PowerPoint format) is the presentation material (on Live Trial) issued at the HMT meeting on 24 February by Andrew Simpkins.

Mark  
Is there anything from the notes that you believe should be given a wider circulation ('communicated' )?

Bob  
<<File Attachment: 2402ALL.DOC>> <<File Attachment: HMT2402.PPT>>

Horizon Programme



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## Fortnightly Progress Reports

for HMT on: 3 March 1999

Cut-Off : 26 February 1999

**Distribution:**

Programme Director -	D. W. Miller
Implementation -	B. McNiven
Testing -	R. Gaze
Product Assurance -	J. Meagher
Service Management -	A. Radka
Programme Office -	J Topham
Communications -	M. Kelly
Release Management -	A. Simpkins

**Copies:** D. Brazear, B. Burkin, P. Kennedy, R Stocker, J. Bruce,  
S. Bond, N. Mohindra

# Horizon Programme



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## Table of Contents

### Programme Projects

1. Release Management
2. Implementation
3. Testing
4. Service Management
5. Product Assurance
6. Reference Data
7. Communications
8. Programme Management Office

### Dependent Projects

9. Transaction Processing
10. TIP (plus APACHI & CBDB)
11. OSG/HAPS
12. SAPADS
13. Pathway  
(input to most recent Checkpoint meeting included for completeness)

### Programme Summaries

14. Integrated Programme Plan Status Report  
(plus Programme Planning Exception Report  
and Programme Four week look ahead)

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 1**

Progress Report for : Release Management  
Report for Period Ending : 26 February 1999

**Achievements**

Following the unilateral decision by CAPS to suspend multi-benefit testing on 8<sup>th</sup> February a meeting with CAPS, Horizon and Pathway was planned to take place at the beginning of this week. However, for contractual reasons, this meeting did not take place and it is still not yet clear how any replanning activity will be taken forward.

Ministerial decisions are also still awaited.

MOT and E2E are underway and good progress is being made. There are a few critical issues at the moment, three of which it is believed can be resolved easily.

The -6 week RAB meeting was held on 26<sup>th</sup> February 1999. This confirmed that there are no major issues currently other than the need to clear the outstanding CCNs (see below) by the final RAB (7<sup>th</sup> April), to resolve outstanding contractual issues such as the BES/PAS boundary, and the development of the Service Management area.

The RAB identified the need to specifically focus on CCNs and those that need to be resolved before the final RAB meeting.

As part of the RAB process an internal review within Release Management was undertaken to identify critical path activities associated with the plan towards the release of NR2.

Work is in hand to develop the process and criteria for the NRO RAB.

Dave Miller has agreed that a Live Trial Manager within Release Management will be appointed as a matter of urgency to co-ordinate and control the Live Trial across the programme.

Migration pre-proving exercise has been successful and has proved to be invaluable. It is largely completed but work will continue until 5<sup>th</sup> March to extend the tests.

Migration plans for 1c to NR2 continue on schedule with no major issues. There is a question over the provision of foreign encashments on the Saturday afternoon of the data centre migration and this is being addressed. The risk assessment for undertaking the dual data centre migration on 12<sup>th</sup>/13<sup>th</sup> June is being evaluated by POCL.

The new version of the Migration PID has been issued and approved by CAPS and Pathway. Awaiting approval from POCL and Horizon (except Graham Shervington).

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 1**

Terms of reference for the co-ordination of reference data changes project have been approved by Pathway and Product Assurance with some minor caveats. The exercise is now underway being led by Bruce Talmage reporting to Richard Gaze.

The E2E design review of NR2+ previously scheduled for early February is now forecast to be completed by 12<sup>th</sup> March 1999 though we await details of impact assessment timescales from associated Projects which is being monitored by Product Assurance and Release Management.

The NR2+ release plan is in development. Now that an APS Product Manager has been appointed to take over from John Bruce, this should progress more quickly.

The agreement of the design and contractual relationships for the APS SPM and Quantum products is running behind schedule and may impact the NR2+ timescales. Pathway have stated that these must be resolved by 31<sup>st</sup> March to avoid impact on the NR2+ plans

**Targets for Next Period**

To control all release aspects of the programme as we approach the final hurdles prior to implementation of NR2.

To gain clarification of CAPS plans for multi-benefit testing and release.

To develop the Live Trial plans.

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 2**

Progress Report for **Horizon Implementation**  
Report for Period Ending : 26 February 1999

**Achievements**

Migration Strategy reviewed, comments returned  
Walkthrough of ECCO to Horizon implementation plan undertaken with OSG / Helpdesk  
Agreed 'fast track' reference data change process incorporated into Guide  
ECCO migration procedures refined through Pre Proving exercise  
Draft low level rollout plan for 204 1c outlets produced  
Agreed the Horizon input to the new counter pedestal which will be produced by outlet equipment  
Completion of investigation into number and type of suspensions that are effecting rollout  
Initial testing of scheduling tool successfully completed, currently taking on FSM improvement suggestions  
New Reporting & Scheduling manager appointed  
Field Support Management (FSM) Process Document with FSM's for review  
2<sup>nd</sup> week of additional training courses being run - research services are assessing the performance of individuals post & pre training, results are due 29<sup>th</sup> March  
All User Guides delivered to MOT on time  
All courses now baselined except HFSO.

**Targets for Next Period**

Completion of the 204 physical upgrade  
Documented and agreed revised role of SSM's  
Way forward found in ISIS offices with ISIS undertaking the shelving / power / LAN box completion for Horizon.  
Agreement to the levels of sign off for HIM / IPM teams following commercial discussions  
Transfer of reporting responsibilities to SNI planned for w / c 22 March  
Baseline POCL HFSO / HFSTL Induction Course  
Pursue filed support training development  
Finalise MiMAN / MiECCO procedures  
Pre Migration Preparation Pack baselined for Live Trial Outlets  
Pro - forma for 'handover' of outlets from Implementation to Service Management finalised  
Live Trial rollout plan baselined  
Walkthrough of ECCO to Horizon implementation plan to all key business areas completed  
Draft Plan for 'Rehearsals' produced  
Arrange spend for all supporting materials for Live Trial filed support (hire cars, cases, calculators etc.)  
Training Mode demo 11<sup>th</sup> March  
HFSO course development

**Horizon Programme**  
HMT Report  
3 March 1999

**Section 3**

Progress Report for **HORIZON TESTING**  
Report for period ending 26 February 1999

**Achievements**

**E2E Final Pass/ Model Office**

Both E2E Final Pass and Model Office Trials continue towards the mid-point in the schedule without any the slippage that characterised MOR and earlier passes. Status remains GREEN.

Bulletins are issued following daily progress meetings for both E2E and MOT and distributed to all key parties. Weekly progress meetings are being held to review both progress and incidents.

The tables below indicate progress with re-tests covering E2E Final Pass and MOT to Friday 26.

**E2E Final Pass (Day 18 of 33) – Reported Friday February 26.**

**Re-tests**

	High	Medium	Low	Total
Re-tests planned in cycle	2	17	20	39
Re-tests planned todate		6	6	12
Re-tests actual todate		6	6	12
Unable to re-test				0
Re-tests failed				0
Retest scheduled but fixed in live trial not E2E		1		1
Incidents closed		6	6	12
Outstanding Re-tests	2	11	14	27

**New Incidents**

	High	Medium	Low	Un-classified	Total
Raised from start of E2E Final	1	32	80	10	123
New Incidents Closed		10	27	8	45
Outstanding new incidents	1	22	53	2	78

**SUMMARY OF OUTSTANDING INCIDENTS**

	High	Medium	Low	Unclassified	Total
Closed to be confirmed		2	7		9
Under Investigation		3	7		10
Unclassified				2	2
Must Fix Before Live Trial (H)	1				1
Should Fix Before Live Trial (M)		5			5
Must Fix Before Completion of Live Trial (M)		10			10
Fix Following Completion of Live Trial			33		33
Fixed for Live Trial		2	6		8
Total Outstanding	1	22	53	2	78

**Horizon Programme**  
HMT Report  
3 March 1999

**Section 3**

Model Office (Day 9) – Reported Friday February 26.

Re-tests

	High	Medium	Low	Total
• Re-tests planned in cycle	5	49	43	97
• Re-tests failed (and now raised as new incidents)		2	2	4
• Incidents not covered in plan	1	6	3	10
• Incidents closed	2	11	22	35
• Incidents pending investigation	1	1	1	3
• Outstanding Re-tests	1	29	15	45
<b>Total</b>	<b>5</b>	<b>49</b>	<b>43</b>	<b>97</b>

New Incidents

	High	Medium	Low	Total
Raised during MOT	0	71	51	122
New Incidents Closed		15	7	22
Outstanding new incidents	0*	56	44	100

Summary of the above				
<b>Closed :</b>				
• Operation/Set-up problem		2		2
• Fixed for Live Trial		7	1	8
• No fault		4	4	8
• Procedural			2	2
• Duplicate of existing call		2		2
<b>Under Investigation with :</b>				
• Pathway		55	44	99
• Horizon		1		1
	0	71	51	122

Incidents raised by TIP have been apportioned between E2E Final Pass and MOT to be re-tested in the following proportions making a total of 202 re-tests overall:

TIP E2E Incidents for re-test from previous E2E cycles	43
TIP MOT Incidents for re-test from previous MOT cycles	23
<b>Total</b>	<b>66</b>

It should be noted, especially for the E2E Final Pass, that re-test progress will accelerate in the final weeks of the trials due to the long duration of these tests.

The number of new incidents is not unexpected but needs to be managed carefully especially in planning any targeted testing before Live Trials. Of concern is the growing number of MOT incidents (30% of 140 – 1/3/99) that are attributable to problems with the user guides & procedures.

**Horizon Programme**  
HMT Report  
3 March 1999**Section 3****Live Reference Data Proving and Year 2000**Validation

- Pathway have encountered problems during the testing of the RDMC and RDDS configuration. As the rig that is being used to test the mechanism is that which was being used to manage the reference data, all validation, CTO and verification is effectively on hold until the work is completed. Pathway are in the process of deciding whether the final configuration will be ready by next week or whether they will need to reinstate the interim delivery mechanism, that was in place before this work, so that CTO and validation work can continue. So far no news on this decision. This rig is effectively two weeks overdue and does not look like delivery, of any sort, before Wednesday.
- Assuming that Pathway do not fail entirely to deliver some kind of platform and counters for OSG to finish the validation work, all products will have been validated by OSG and are just awaiting business sign-off.
- OSG/HAPS report that good progress is being made although I have not yet been given confirmed delivery dates. I will be visiting Farnborough on Monday or Tuesday to assess the current situation face-to-face.
- Pathway are planning a regression test of the new cash account report layout in March.

Change Control

- 
- This is effectively on hold until the rig is returned.
- As a result of discussions with TIP, Pathway, OSG, POCL RDS numerous other people, I have given OSG the go ahead to raise the changes for the product cash account mappings for the 1999/2000 change ahead of schedule (i.e with earlier effective dates). This gives us a better chance of validating the changes ahead of live trial and doesn't appear to have any detrimental affect.

Issues for Management Attention

- 
- A problem has been discovered where some changes made on the POCL RDS have not found their way to Pathway. Investigations are underway within POCL RDP to find out where/how this has occurred. Current theories are that this is due to an operational hiccup which does not present an existing danger. If this proves not to be the case, and there is a generic problem with the RDS change control/delivery system, this could be a serious programme issue.
- The CR, 32a, for the cash account report format (amongst others) changes has not been approved. The font size change seems to be a major stumbling block. This has already been raised as an issue at checkpoint by Rod Stocker but you should be aware of its continued presence as an issue.

**Year 2000 testing**

Nothing further to report with Year 2000 testing.

**Technical and Security Testing**

- PinICL clearance continues albeit at a slow rate due to test cells being upgraded to Live Trial increment. More positive progress should be seen in coming week.
- Integrity, Systems Management and Security Test Reports revised for regression testing and approved for issue.

NR2 Business Impact PinICL's CURRENTLY OPEN BY DOMAIN - situation as at 18:00 19/02/99 is:

**Horizon Programme**  
HMT Report  
3 March 1999

**Section 3**

Following an exercise with Pathway last week, the security issues can be further categorised:

DOMAIN	High	Medium	Low	None	Not Allocated	KPR	Total Raised
Integrity	0	7	26	3	0	5	41
Performance	0	0	14	0	0	2	16
Security	0	9	44	0	0	14	67
System Man	0	1	7	0	0	1	9

**Performance - Summary:**

- All the Performance Test kit and the EMC discs unit have been repositioned for Tranche3 tests.
- The EMC disc clusters have been re-configured to operate with SCSI connection. The EMC unit now has four disc clusters, which can be operated independently. The message store for Tranche3 testing is now being built.
- The Counter Autoconfiguration test is now complete. Tests to load the virtual office and replicate outlets within the Correspondence Server are continuing.
- The Test set-up is being built for the 4.10 CNOMPOS test together with building two separate message stores involving unique NINOs.
- ITSA have yet to issue the report on the CAPS Batch interface test.

**Issues**

- A new approach to the management of Performance Test activity is being proposed. This needs early resolution so that it can be adopted for Tranche3.
- The Correspondence Back Up Test 8.3 is delayed as we are dependent on CFM to carry out this test on EMC cluster at Bootle.

**System Management - Summary.**

- AutoConfiguration performance tests run on latest message store completed.
- Counter patch tested
- MOT latest counters tested successfully
- Test report issue 1.2 updated and approved
- Draft version 0.3 of consolidated Y2K test report updated (2 Security Y2K tests still outstanding)
- Further PINICL clearance

**Issues**

- Regression tests on SB 9F8 – Some software distribution tests and autoconfiguration tests have been run already using the Performance and integrity rigs. We cannot run the full regression suite until the Security rig is upgraded.
- RODB not available

**Integrity - Summary:**

- Rebuild of Integ B test cell to 9Finc8 is now complete. Build of new Network is now complete. Network and System Confidence Test now in progress.
- Rebuild of Integ A test cell to 9Finc8 is now in progress and nearing completion.

**Issues**

- We are still awaiting delivery of CP 1541 and have not been notified of a delivery date. This means

<b>Horizon Programme</b> HMT Report 3 March 1999	<b>Section 3</b>
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**Issues**

- We are still awaiting delivery of CP 1541 and have not been notified of a delivery date. This means that the recovery of a PC in an outlet has not yet been fully proved.

**Security - Summary:**

- Security rig maintained at MOT build (7.2.2). Decision taken to remain at this status until availability of 10F due 1/3/99.
- PinICL clearance has continued

**Issues**

- Rig not moving to Live Trial baseline until 1/3/99 places a risk to end dates.
- Number of open PinICLs continues to remain relatively high. Currently 67 in total.

Issues - Identify new issues for escalation or information	
Issue Description	Issue Action
Definition of MOT/E2E exit criteria is required for RAB	RG/JMeagher to define – TBC w/c 1/3/99.

Risks - Identify new Risks for escalation or information	
Risk Description	Risk Action
Action is required to retain key test team staff, many of whom will return to base in March.	Review options with PMO.

- |  |
|--|
| <b>Targets for Next Period</b> <ul style="list-style-type: none"> <li>• Post MOT &amp; E2E targeted test planning</li> <li>• Distribution of Exit Criteria document</li> <li>• Outline planning for NR2+</li> <li>• Budget/Test Scope</li> </ul> |
|--|

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 4**

Progress Report for Business Service Management  
Report for Period Ending: 26 February 1999

**HR/Comms**

**Achievements:**

- Business case work completed
- Meeting with SSL to discuss HR issues and now have point of contact. Further meeting organised for 3 March during visit to Doxford
- Resourcing for live trial underway
- Modular training package for live trial being put together
- Industrial relations - briefing to CMA on 17 February, reiterating offer to CWU.

**Targets for Next Period:**

- Communication of live trial
- Communication of location decision
- Training package designed
- Resourcing completed
- Understanding on HR issues reached with SSL with agreed approach.

**Business Support Centre**

**Achievements:**

**Network Business Support Centre**

Presentation successfully given to BA and ICL Pathway about the Network Business Support Centre

Presentation successfully given to the CMA

Direction and population of service design workstream clarifying. Project team resourced

Good start of working up impact analysis of incidents arising from "steady state" with the team as input to the benefit management plan

Improved liaison between POPH, SSL and myself on the business case

Post Office Counters Ltd business concurrence signed off

**Service Design**

Responsibilities for development of Business process support interfaces have been identified, and are allocated to specific members of the design team.

Assistance from Pat Rice is being provided to map the entirety of Business Support that the NBSC will be required to provide.

First walkthrough attended - Business Continuity

Reference data workshop highlighted degree of interaction with ICL Pathway that will be required, irrespective of contract renegotiations. Contact established with Reference Data team, HSH service development and POITS RD development

'Essentials' for live trial identified

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 4**

Contact established with BA CAPS and Pathway PCHL

**Live Trial:**

Two more PO's in place and tasks allocated so we can start to map processes and gather information.

Work started with Andrew Dowson to firm up Horizon 'scenarios'

Training booked for all new staff. Material identified for telephone techniques course.

Meeting held with TP - now clearer about our interfaces, although not how we will handle RED reports

Visited Bristol to view Helpline operation - no vast differences to NE - just information requirements

Agreed opening hours - need to find volunteers to work until 8pm on Wednesdays.

Draft standards put together for live trial staff

Meeting booked with 9 staff who have been identified, to tell them what our plans are and as a 'team building' exercise.

**People:**

- Continuing to work on organisational structure for BSM and accommodation/migration issues
- Resourcing for BSM posts - all assessments completed
- Overall resourcing plan prepared and issued
- Internal communications activity plan put together
- Further contact made with SSL on support centre HR issues
- More job descriptions prepared
- Plan completely updated and ready to baseline
- Presentation given to CMA

**Targets for Next Period:**

**NBSC:**

- SSL MaPEC case finalised with necessary Post Office Counters Ltd's input
- roles and responsibilities within IT workstream clarified
- process for liaison across SSL, Post Office Counters Ltd and suppliers agreed with SSL project controller
- project plan baselined

**Service Design:**

Initial call matrix produced for NBSC

Scoping exercise completed, POCL resources released for detailed design of end-to-end OBC procedures for use in the NBSC

Reconciliation walkthrough completed

Principles for Pathway and BA interfaces agreed

Discussions on electronic interfaces to Pathway and BA commenced

**Live Trial:**

Sort out scripted responses for as many potential queries/ problems as possible.

## Horizon Programme

HMT Report  
3 March 1999



## Section 4

### People:

- Communications plan issued following team planning day
- Modular training package put together for live trial
- More jobs described and evaluated
- HR issues discussed and approach agreed with SSL
- Resource and migration plan agreed

### Development Strand 2

#### Achievements

BSM Development plan completed  
Incident/ Problem framework docs issued for final review.  
Implementation plans for live trial BSC in place  
HAPS System recovery test in place  
Specification for Configuration database with POITS  
BCM walkthrough held  
BCM framework doc nearing completion  
POCL risk assessments almost complete  
Plans to deliver ICL /Pathway recovery plans in place  
John O'Brien (RNM Midlands ) to join BSM Dev team  
Assessments for BSM posts commenced

#### Targets for Next Period

ATP framework developed  
Problem/ Incident Management Documents signed off  
BCM framework document agreed

#### Business Case

##### Achievements

Budget bid prepared and submitted to Horizon finance team. AR had a meeting with DWM to agree cuts to bid. Proposed cuts amount to £2.2m made up mainly of reductions to the SSL charge, T&S, Staff and recruitment costs. A full breakdown of this figure, with explanations, has been circulated to AR's direct reports. This figure is subject to change as the Star Chamber review has yet to be finalised and further cuts could be imposed.

Group Investment Appraisal have indicated that POCL will have to submit a business case to MaPEC. Advice has been given to the Project Manager (KD) regarding this.

Project Performance report prepared for David Smith's team. This was the first time we had sent this report and the information was taken from the CoMPEC case and the project profile. This will be a monthly requirement and hopefully future months reports

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 4**

will be more comprehensive. I have circulated the report to Lead Team members for their input.

**Project Office and OBC**

**Achievements**

- Risk and Issues Manager appointed - Nicola Wood (starting 02/03/99)
- Programme Office Manager appointed - Paula Astles (starting 22/03/99)
- Assurance Manager appointed - Diane Woodhouse - Diane is joining from the Midland region for two days per week for an initial three months providing assurance on programme deliverables.
- Maggie Roberts is now located with the rest of the Business Service Management team in the Portacabin.

**Targets for Next Period**

- Operational Business Change (OBC) report to be formalised for w/c 8<sup>th</sup> March 1999
- OBC presentation to HMT due on the 17<sup>th</sup> March 1999
- Dialogue between Business Service Management and OSG to commence.

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 5**

Progress Report for : Product Assurance  
Report for Period Ending : 26 February 1999

**Achievements**

**Solution Architecture**

- A proposal document outlining the role, responsibilities and outputs of the Joint End-to-End Design Board has been drafted and will be circulated for review on 1 March.
- Baseline Architecture Documentation still being re-worked following agreements made at the JED Working Party. This has taken a lower priority as the NR2+ work takes precedent.
- Joint working continues on NR2+: end-to-end design being documented for AP SMART and Direct Client I/F; AP Migration; Soft EVP and LFS. Internal reviews have been performed on AP & EVP. Reviews with the Sponsors have taken place for AP. A series of joint design walk-throughs have been arranged with Pathway.
- LFS CARS required for design phase were delivered to Pathway on 12 February, however, further comments were received from POCL five of which potentially constitute new requirements which will now be introduced via. CR.
- Meeting held with TIP and Pathway to agree way ahead on TIP's requirements of Pathway for a series of minor performance enhancements in NR2+. The scope of these was agreed and Pathway concluded that apart from one change they were all minor changes. Way ahead agreed on all other requirements hidden in appendices of AIS. TIP to raise a CR for Pathway to formally impact. There is no perceived impact on the end-to-end design.
- Work has continued on the NR2+ Storyboard
- Feedback from Pathway on Reference Data's requirements of Pathway for NR2+ now received. AIS being revised and will be reviewed when complete.
- Y2K work progressing well. R2 is compliant. Test Closure Report re-worked following comments received. Work plan for 1999 is progressing. R1C Contingency Options Paper has been reviewed and was taken to Horizon Board - CR to be raised for option 5 regarding release 1C.

**Acceptance**

- 21 acceptance specs are now at status 'green'. The 3 remaining specs are: BES status 'red' where POCL have now written to BA proposing a way-forward; BPS Performance status 'red' was raised late and being reviewed, however, this could be subjected to the same problem as BES; POCL Infrastructure 'amber' but moving to 'green'.

## Horizon Programme

HMT Report  
3 March 1999



## Section 5

- Acceptance Trials closure reports received for OBCS, AP, Reference data and Customer Education - all in review.
- We have now agreed the outline approach to acceptance reviews with POCL and the process document has been issued for agreement.

### Assurance

### Security

- Pathway have report that physical security has been upgraded at a number of sites (Wigan etc.) as requested. Inspections will be undertaken by the security team, probably during Live Trial.

### Functional Design

- BES - Summarised receipts for BES agreed with POCL and now submitted to BA for approval although Pathway indicate that the POCL agreement is too late for incorporation into NR2+ - negotiations are ongoing to obtain agreement on inclusion. Assessing current design of BES/OBCS reports & receipts aimed at achieving sign off of Reports & Receipts Document - await Pathway to advise the NR2 implementation. Reconciliation 'A 2 A' related documents completed but still awaiting final POCL sign off.
- OBCS - provisional way forward identified for reformatting the stop-list - await POCL to raise CR for 2+
- CAPs Interface DIDVR for R3.5 approved by Pathway
- User Guides - 4 user guides updated as a result of PPD comments and MOR3 PinICLs
- Automated Payments - process review panel now to be formed, aim to complete APS review mid April.
- Reference Data - discussions with Pathway and Service Management to determine scope for accounting reconciliation incidents via RD. Appears likely that some accounting incident process management work will be needed. Agreement between BA & POCL on PO closures and transmission of reference data for Bank Holiday Closures
- EPOSS Assurance reviews recommenced, covering discrepancy handling, journalising and access control. Meeting 11 Feb discussed our paper outlining solutions to stock unit establishment as outlet migrates to Horizon. Final BPD process review on 17 February. Aim to produce joint EPOSS Incident Reconciliation paper by 8 March
- PPDs - Reviewed PPDs against EPOSS design, User Guide and BPDs.
- Audit - Schedule of acceptance reviews agreed with Sponsors.
- Business Process Diagrams - Other than EPOSS, version 5.0 of the BPD document were finished on time on 19 February and passed to reviewers of the PPDs. EPOSS BPDs have been delayed awaiting revised versions of the Functional Description and Business Rules from Pathway. (The impact of

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 5**

this is reduced because the EPOSS PPDs have also been delayed). We are now using Pathway's internal versions of the Functional Description (version 3.8) and Business Rules (version 0.9) to enable the EPOSS diagrams to be completed. The EPOSS BPDs will be issued on 26 February. We will issue the full version 5 document when we have final versions of the Functional Description and Business Rules from ICL Pathway.

- **Infrastructure:** - Revised specification for Moveable Solution and final prototype reviewed. Amended documentation still to be provided, but no issue. Initial discussions on "laptop" solution have begun. A series of Technical Assurance Forums have now completed. 20 Issues (potential system deficiencies), 32 Queries (extant actions / apparent contradictions) and 7 Queries from the last TAF that missed the early submissions. Only five items have been closed down so far.
- **KPR** - Ongoing reviews with sponsors.
- **Reconciliation:** Agreed with BA that all process documents will be baselined and those signed off at the working level will be subject of CRs to place them on the contract controlled register. All EPOSS processes have been analysed and reviewed by the process development panel. The E2E process document will be issued on Monday 1 March for final validation prior to its issue for sign off. Any significant impacts on the User Guide will be recommended for change to Head Office Publications.

**Targets for Next Period**

**Solution Architecture**

- Finalise documentation set, JED processes, TOR and produce JED Proposal Document for initial review.
- Continue to develop documentation set as a low priority
- Arrange a meeting with CAPS to update him on progress of JED W/P and ensure on-going commitment.
- Continue to progress NR2+ design initiatives. Complete PETS and PPETS - in particular, complete LFS PETS.
- Complete NR2+ Storyboard
- Complete NR2+ Internal SAT Design reviews and Reviews with the Sponsors
- Arrange and commence NR2+ Joint End-to-end Design walk-throughs with Pathway
- Commence pulling together RETS and 'Design Framework' pack. Prepare for presentations to Horizon.
- Gain sign-off to Y2K Test Closure Report

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 5**

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**Acceptance**

- Progress three Acceptance Specifications (BES, POCL Infrastructure and BPS Performance) to a state where they can be approved.
- Progress the sign-off OBCS, Customer Education & APS closure reports and resolve Customer Education Closure Report.
- Agree the process for management of Acceptance Incidents, in Live Trial.
- Complete the conduct of Acceptance Reviews in conjunction with Pathway.

**Assurance**

- Continue to identify design issues and develop associated work-arounds.
- Work on reviewing and agreeing the KPR with Sponsors.
- Continue to support resolution of issues emerging from Testing.

# Horizon Programme

HMT Report  
3 March 1999



## Section 6

Progress Report for : REFERENCE DATA

Report for Period Ending : 28 February 1999

### Achievements

- Plan for Reference Data in BAU continuing.
- Full review of risks and issues completed and logs revised.
- Full project review methodology and reporting implemented.
- Progress according to plan on 6.3.
- Progress according to plan on testing.
- RDS/Pathway/TIP synchronisation issues near to resolution.
- Business continuity co-ordinator appointed.
- Approach to closure agreed with BA.
- OLA work with Pathway and TIP progressing well
- Product / Outlet mapping data distributed for sign-off by Head Office account teams.
- Outlet data signed off as accurate by RGMs for live Trial offices.
- Low-level, detailed, operational quality plan implemented.

### Targets for Next Period:

- Continue discussions about Service Management support of RDS.
- Progress discussions with Data Management and conformance project teams to ensure best fit and utilisation of Reference Data.
- Continue BAU plan.
- OLA with Pathway in final draft.
- OLA with TIP in first draft.
- Synchronisation measures agreed.
- Agree automated type B feed.
- Continue release 2+ planning and scoping.
- Business continuity measures planned.
- Continuing detailed work on release 2+
- EtoE/MOT testing underway.
- Work will continue on enhancements to the processes to encompass class b and error management procedures.
- Sign-off of "live trial" item/outlet data.
- Ongoing data quality activities.
- Ongoing resolution of PinICLs. The target is to achieve zero open PinICLs.

**Horizon Programme**HMT Report  
3 March 1999**Section 7**

Progress Report for : **Communications**  
Report for Period Ending : 26 February 1999

**Achievements**

Summarise Communications Strategy, including ICL Pathway role  
Develop and present Management Awareness Event (phase two) content in line with existing plan  
Prep. media briefs for Communications panel 26.2.99  
Customer Education Implementation Group meeting - DSS Newcastle 23.2.99  
Follow up on Payment Card TV ad.  
Liaison with ICL Pathway - Anna Campopiano 23.2.99  
Arrange ICL Pathway Customer Education presentation to Heads of Communication Network- Apr  
Develop Horizon/BSM Intranet site - meeting 17.2.99  
Clear *Horizon Update* article 19.2.99  
Clear Vision & Mission link article for *Courier*  
Clear 2<sup>nd</sup> article for *Midlands Focus*  
Clear article for NW/NW regional publication *All Together Now*  
Clear *Government Gateway* exhibition panels  
Draft article for RML South Central  
NE Regional Roadshow - Carlisle 18.2.99 - 19.2.99  
Progress Horizon presence at Sub Post Office Exhibition, Doncaster 24<sup>th</sup> - 25<sup>th</sup> April  
Progress Horizon presence at NFSP Conference, Scarborough 17<sup>th</sup> - 19<sup>th</sup> May  
Progress Horizon presence at CWU Conference, Bournemouth 24<sup>th</sup> - 26<sup>th</sup> May  
Review use of Horizon messages with ICL Pathway 26.2.99  
HMT meeting (Feltham) 26.1.99

**Targets for Next Period**

Analyse and report back on feedback from Horizon Team Leaders briefing notes/sessions  
Develop NR2+ communication plan 2.3.99  
Reissue Horizon Communications strategy and tactical plan  
Liaise Operational Service Management re: steady state closure notices 17.2.99  
Clear articles for regional Talkback pages  
Clear article for regional publications  
Finalise Horizon implementation guide  
Communications strategy and organisation meeting 9.3.99  
Horizon communications and ICL Pathway 10.3.99  
Liaison meeting with ICL Pathway (Press and PR issues 5.3.99)  
Exhibitions/conference planning  
Draft and clear update article for Newsbrief Monthly (March)  
Confirm outline article for *Your Business* (April)  
Arrange interview with Dave re: Horizon article for *Courier* (April)  
Horizon open forum (March)  
Lotus Notes training 1.3.99  
Management team meeting - TH 3.3.99  
Management team meeting - Feltham 10.3.99  
A/L 11-12.3.99

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 8**

Progress Report for : Programme Management Office  
Report for Period Ending : 26 February 1999

**Progress against Plan**

**Change / Document Management**

Agreements to Agree - A meeting took place with Pathway on 24 February to review progress on the submission of Agreements to Agree. Pathway have made limited progress in submitting A to As during the past two weeks, and are not in a position to meet their internal target to complete submission of outstanding A to As by the end of February.

Volumes of work in the change and document management area are increasing in the lead up to the NR2 Release Authorisation Board.

Arrangements have been set up to increase the level of monitoring, review and, where necessary, escalation of outstanding CCNs which need to be resolved before the Release Authorisation Board for NR2 can reach a decision.

**Facilities - Move from Terminal House to Greville Street**

Discussions have continued with the Migration Team on the provision to be made at Greville Street for the Horizon Programme. Decisions have still to be made on which other POCL groups will be based at Greville Street and these will need to be framed in the context of wider Post Office re-organisation activity. Development work on the Horizon move will be tentative until the final occupiers are decided.

The current plan assumes that all Horizon staff currently in Terminal House (including the Business Service Management Team) plus the Implementation staff based at KEB (125 staff in all) will move to Greville Street. The staff outhoused at SELDO and Feltham will not be moved. Any changes to current staff numbers need to be advised urgently.

Discussions are taking place with the IS / IT Strategy Group on computer support at Greville Street and on arrangements for the transfer of data.

**Finance**

Initial review of budget bids completed, and HMT members advised of budget reductions.

**Planning**

The Integrated Programme Plan has again been updated based on input received from Horizon Teams and support projects as part of the fortnightly turnaround process. An update from BA CAPS was also received.

A response has been issued to Pathway addressing their comments on the IPP received at the 24 February Checkpoint Meeting. Some of Pathway's comments / dates quoted have been used to update the IPP.

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 8**

Following discussion with Business Service Management the BSM activities on the IPP have been revised and additional Level 1 activities added.

A meeting has been held with the Release Management Nile 2+ Manager. Work will continue on developing the NR2+ plan to a revised structure.

**Targets for Next Period**

**Change / Document Management**

Agreements to Agree - Further discussion with Pathway on the process for the submission and delivery of Agreements to Agree, and the identification of Agreements to Agree that must be in place in time for the Release Authorisation Board for NR2.

Monitoring and progress chasing for outstanding CCNs for NR2 as input to the 11 March Release Authorisation Board.

Review of document and change management arrangements to support staff changes at the end of the financial year.

**Facilities - Move from Terminal House to Greville Street**

The Migration Team are due to provide initial layout plans for comment by the Horizon Programme.

Continuation of discussions with the IS / IT Strategy Team on the provision of suitable PC network services at Greville Street and transfer of information from the Terminal House network.

**Finance**

Further review and analysis of the Programme budget with Dave Miller to identify other savings / approaches to bridge the budget shortfall.

**Planning**

Further meetings to be held with the NR2+ Manager to aid development of the NR2+ plan.

**Risk / Issue Management**

Meeting of the Risk & Issue Management Focus Group scheduled for 4 March 1999.

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 9**

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Progress Report for :      **Transaction Processing**  
Report for Period Ending :   **26 February 1999**

report unavailable at time of issue

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 10**

Progress Report for : TIP  
Report for Period Ending : 26 February 1999

The build phase for Batch 1 has started and is scheduled to complete at the end of April. In view of changed timescales within the business for delivery, it has been agreed that the Batch 1 functionality currently within Batch 2 (due to the original timescales for delivery) will be moved into the Batch 1 delivery under Change Control.

The Post Office Board decision to approve the Data Hub and Operational TIP business case but not to incur any further 'incremental spend' until the Horizon issue is resolved, has led to the development proceeding on a rolling one month notice period to limit liability.

Capital spend for the Data Hub machine and Operational TIP System Testing has been deferred. If the Horizon issue is not resolved in the near future then alternative methods for both system testing and provision of a Hub Service will have to be put in place. This should now be considered as an increasing project risk.

The strategic planning for the System Test phase has been delayed due to the key resource being seconded to Interim TIP to cover for staff shortages and inexperience. This should now be considered a project risk.

The Interim TIP work has concentrated in the final pass testing for End to End and Model Office and is on target. Daily reports are being produced to support co-ordinated activity.

Planned Activity	Achievement against milestones	Okay ?	Planned next period
<b>Interim TIP</b>			
Current activity is outside of that planned in order that the May 1999 Horizon target can be met.	Carried out various test phases	Y	Complete end to end/model office final pass testing.
	Progressed the preparation of the MOT & E2E scripts and expected results	Y	
	Commenced end to end and model office final pass testing.	Y	
<b>Operational TIP</b>			
Clarify position on incremental spend on project.	None. Project proceeding on the assumption of a rolling month's notice until Horizon issue resolved.	N	Progress the delay in purchase of production hardware. Original order date 18/12/98

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 10**

Raise non chargeable change control to move any Batch 1 functionality (originally in Batch 2 due to timescales) into Batch 1).	Complete	Y	
Obtain sign off for Batch 1 high level design.	Completed.	Y	
Continue Batch 1 detailed design and development.	Ongoing	Y	Complete detailed design and continue development and testing strategy.

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 11**

Progress Report for : OSG/HAPS  
Report for Period Ending : 26 February 1999

**Achievements**

**Progress:**

- NR2E.3
  - Pathway have indicated that a Cycle 2 of Direct Interface Testing will not be required. Confirmation in writing that this is correct has been requested.
- OSG Supporting End to End
  - Testing started on schedule and has shown a marked improvement from previous E2E cycles.
  - Initially a few problems were experienced with delivery of Horizon files but these appear to be mainly due to Pathway set-up errors.
  - To date HAPS APS reconciliation has been successful, however it should be borne in mind that only very limited transaction volumes are being tested.
  - Horizon APS Reconciliation Reports have been received from Pathway for the first time since testing began. A number of errors and omissions have been identified by OSG which Pathway BSU are tracking under the PinICL system. It is expected that these errors will be resolved for Live Trial. As yet, it has also not been possible to test all of the reports received from Pathway.
- OSG Supporting MOT
  - Testing started on schedule with only minor problems experienced in the first week.
  - However, since Day 6 delivery of Horizon files has been problematical. Horizon files are currently having to be processed one day later than planned due to the problems being experienced.
  - PinICL's have been raised against the problems and Pathway have been attempting to resolve them all week.
  - A request has been received from Pathway for the outstanding files for yesterday to be processed today in an attempt to get MOT back on track for the weekend. Pathway have also provided assurances that the problem will be resolved today.
  - The first Horizon APS Reconciliation Reports have been received from Pathway today covering the last four days of testing. As yet the reports have not been fully reviewed.

**Targets for Next Period**

- Receive confirmation from Pathway that NR2E, DIT cycle 2 is not required.
- E2E Final Pass and MOT - continued support to the Horizon Test Team

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 12**

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Progress Report for : **SAPADS**  
Report for Period Ending : 26 February 1999

Report unavailable at time of issue

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 13**

Progress Report for : ICL Pathway  
Report for Period Ending : 24 February 1999

**1. PLANNING**

**1.1 Plan**

A review has been conducted of the Horizon IPP version 7 and a formal note will be issued. The review also contains comments on some non-Pathway activities. A new version of the Horizon IPP was received on 19/2/99 and comments will be included in the version 7 comments w/c 22/02/99.

**1.2 Handshake milestones**

No input has been received from Horizon concerning the Implementation handshake milestones issued on 21/1/99. In order to move things forward Pathway have issued the list again, with the latest set of date information. The expectation is that Horizon will issue an updated list by 26/2/99. The list of NR2+ design milestones will be issued into the Horizon turnaround process also on 26/2/99.

**2. TECHNICAL & SECURITY TESTING**

**2.1 General**

As we are now at the stage of running MOT and preparing for Live Trial the frequency of the joint reviews of outstanding PinICLs with Horizon has been increased to weekly. An Acceptance Testing Documentation completeness review has been conducted.

**2.2 Performance**

The MIS interface (test 6.4) report has been issued for comments, as has the report for test 4.9, OBCS Stops.

**2.3 Security**

Regression testing the MOT software has completed all high and medium impact PinICLs that would impact MOT have now been closed.

**2.4 Technical Integrity & Networking**

The test report detailing results of MOT regression testing has been approved at issue 1.1 and distributed. Further regression now continues in preparation for Live Trial.

**2.5 Systems Management**

The last outstanding failed test in this area has now been rerun on the MOT software set and passed. MOT regression testing has now completed and the test report updated, approved, and issued at version 1.1.



### 3. MULTI BENEFIT TESTING WITH CAPS

This phase of testing was abandoned by CAPS on 8/2/99 with the last runs being undertaken on 5/2/99. Pathway have retained the test environment awaiting further developments.

### 4. END TO END

End 2 End testing preparation commenced 8/2 and counter activity started 13/2 and has progressed successfully each day since.

There have been teething issues with the daily reporting of incidents, but this is starting to come under control. To date there have not been any High priority incidents and the majority of incidents raised have been of a Low priority.

Some areas of functionality that have known issues and an agreement to a Live Trial resolution have caused problems. These have been raised on the POCL co-ordination report, although they were known issues, and have caused a downward movement in the overall performance summary reported.

Pathway needs assurance that the POCL co-ordination report remains in the POCL domain and requests clarification as to whether Pathway should respond to each statement made in case misunderstandings arise.

### 5. MODEL OFFICE TEST

MOT started on schedule with counters being delivered into Borough on 15/2. The first R1c counter activity and the first PO migration to R2 was on 17/2.

To date testing has progressed well, with the Data Centre migrated to R2 over the weekend of the 20/21-2.

R2 counter activity on the R2 Data Centre commences 22/2.

### 6. TRAINING DEVELOPMENT

#### 6.1 User Training

Training for POCL staff involved in E2E and MOT has taken place.

#### 6.2 HFSO Training

No progress. POCL's informally requested changes to the course structure have still not been finalised. A meeting is scheduled for 25/2/99 in an attempt to resolve the outstanding issues.

**7. EPOSS USABILITY STUDY (Twickenham)**

The electrical work has been completed successfully. WTL inspected the work on 12/2/99. The counters were built and tested w/c 15/2/99 and installation took place on 19/2/99. The study commenced 22/2/99.

**8. ACCEPTANCE PREPARATION & TESTING****8.1 Acceptance Specifications**

BES - the specification is still awaiting a definitive statement from POCL on the outstanding issue.

POCL Infrastructure - the specification is currently undergoing a small number of changes to resolve the outstanding issues, which have been agreed in principle. Reissue is expected within the next 7 days.

Service Boundaries - comments have been received and discussed with the Horizon Acceptance Test Manager. A formal response to comments will be issued w/c 26<sup>th</sup> Feb. In parallel the Horizon Test Manager will discuss several areas of principle with sponsors.

**8.2 Acceptance Trials**

OBCS / APS closure reports have not yet been agreed. A reissue of the OBCS closure report was requested and completed. Comments on, and approval of, the APS closure report are awaited.

An updated schedule for other trial closure reports was provided to the AMF (18/02).

**8.3 Acceptance Reviews**

The Customer Education Acceptance Review was completed (16/02), a small number of criteria require further action (conditional acceptance); closure is expected during the second half of March.

Fourteen of the Acceptance Review plans have been issued; an updated plan schedule was provided to the AMF.

**9. REFERENCE DATA****9.1 Live Reference Data**

The POCL verification of Product Data for NRO continues. POCL are forecasting this will be complete by the end of February.

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 13**

**9.2 Type 'B' Interface for NRO**

Draft CR (36) and POCL AIS has been submitted to ICL Pathway for comment. ICL Pathway has reviewed the document contents and has put forward some additional amendments to both the draft CR and AIS document. POCL has agreed to revise and resubmit by the 26/2/99 for ICL Pathway formal review.

A test file of sample data (using the new type B AIS) was supplied by POCL to ICL Pathway on 19/2/99 for analysis, but further files are expected over the following few days.

**9.3 Migration Pre-Proving**

It has been jointly agreed to extend this testing in parallel with MOT. MIECCO is now operational and it is planned to start testing the procedures.

**9.4 AP Client Take on (Backlog - May to December)**

Due to rig rebuild and testing, no AP Client take on validation took place last week. A meeting with POCL to define test criteria for 1999 Client Take-on took place on 9/2/99. Agreement was reached that the backlog test scripts were acceptable and that min and max limits would be included for future scripts. Fallback and recovery would not be included, either for backlog, or for future scripts. This was agreed by POCL and ICL Pathway. It was also confirmed that the above would be documented in the ICL Pathway AP Client Take on service description by the 5/3/99.

**10. NATIONAL ROLL OUT PREPARATION**

**10.1 Customer Education**

CCN 399 has been resubmitted as CCN 399a following a wording revision.

Agreement to the Customer Education plans is still awaited and further progress cannot be made.

**10.2 Implementation**

**10.2.1 Metrics**

Status as at 14<sup>th</sup> February 1999 :

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 13**

Activity	Previous Total	Current Total
RGM letters issued	8604	9237
MIB events held	154	169
MIB attendees	7512	8190
Site Surveys undertaken	5678	6274
Site Re-surveys Required	2024	2272
Site Re-surveys undertaken	1494	1786
Site Modifications done	612	698
Site Preparations done	1071	1440
Sites RFI	1071	1440
User Awareness Events held	0	0
UAE attendees	0	0
ISDN lines installed	0	0
Training Events held	0	0
Trained Users	0	0
Sites Installed	0	0
Sites Accepted	0	0

**10.2.2 Live Trial Preparations**

**Infrastructure**

The preparations for the 103 live trial offices have now been completed. Of the outlets requiring REB connections one has been identified as outstanding and is scheduled for connection 18th February 1999.

Circa 50% of sites have been quality checked by WT and they now intend to quality check the remainder. The target completion date for the WT quality check is the end of March.

The inspectorate service has now been initiated on these sites and site activity will commence at the beginning of April. Inspectors are being identified and the necessary training programmes are being scheduled.

**Installation**

Appointment calls have been made for those offices in the 1st week of the installation period in accordance with the schedule. 5 outlets have been passed to the appropriate POCL regions for resolution to issues such as postmaster unavailability, no nominated DRI.

Appointment calls for outlets scheduled for installation during week 2 have started as of this week.

**10.2.3 1c - 2 Migration**

The profile for the 204 is as agreed with the following factors incorporated:

- 6/7th May for contingency is agreed
- The beat rate will not exceed 20 outlets per day on any day
- The rollout should be weighted 60% SW/SW and 40%NE

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 13**

- All outlets with APT's should be back weighted as far as practicable - POCL are checking their database to ensure a true record of APT offices can be cross referenced to our rollout database.
- As far as practicable the rollout plan should avoid having MVL outlets at month end / beginning. And a list of outlets received from POCL is being checked as a true record of MVL outlets.

A scheduling exercise has been carried out for the 204, awaiting confirmation from POCL

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 14**

**HORIZON Integrated Programme Plan (IPP)**

**1) Plan Status:**

- The IPP has been updated against input received from HORIZON teams and support projects. The latest plan is version 7.3.
- BA CAPS plans have not yet been revised to reflect the latest replan dates (still showing MOT completing 18 December 1998). The CAPS Programme Executive Team (PET) are meeting w/c 1 March to discuss the replan / way forward. The outcome and any agreed dates will be reflected in future CAPS plans.
- The full impact of the suspension to the Multi-Benefit testing has still to be identified and reflected in the plans.
- NR2+ plan is still in development. The End to End design is forecast to complete mid March (was end January) and Release Management are to ask dependant projects to carry out an 'impact assessment' so that the knock-on to overall release timescales, including development and joint testing, can be assessed. Pathway still recognise the 29 January 1999 as the date for complete NR2+ design and have not provided any other NR2+ dates.
- In view of the above, activities relating to Multi-Benefit and NR2+ have not been included in the attached Exceptions and Look-ahead reports.

**2) Key Dates:**

- The impact of the turnarounds on key baselined dates is:

<u>POCL Child Benefit</u>	baselined	current forecast	<i>forecast in last report where different from current forecast</i>
Complete MOT	12/3/99	12/3/99	
Complete E2E Final Pass	12/3/99	14/3/99	12/3/99
RAB	7/4/99	7/4/99	
Commence Office Migration	12/4/99	11/4/99	12/4/99
Data Centre Migration (weekend)	8-9/5/99	8-9/5/99	
Complete Office Migration	16/5/99	9/5/99	
Start Live Trial	17/5/99	10/5/99	
Dual Data Centre Implementation	22-23/5/99	22-23/5/99	
Start National Roll-out	31/8/99	23/8/99	

**Horizon Programme**  
HMT Report  
3 March 1999



**Section 14**

**3) Period Exception Reporting (IPP V7.2 vs V7.3):**

- List attached showing variances against the previous IPP update of 15 February.
- The main variances are in the following areas. There are no impacts on key dates.

**Implementation**      up to 20 days slippage on POCL Commercial decisions

83 days variance against HFSO recruitment. This is the result of a more realistic forecast being provided.

**Product Assurance**    49 days slippage to completion of Acceptance Trials.  
This is because we are now using Pathway's forecast for completion (details from Pathway following last Checkpoint meeting).

**Business Service Management**    20 days variance on MaPEC decision due to MaPEC deferring the presentation for one month.

**4) Four Week Look Ahead:**

- A Gantt chart view of the Level 0 & 1 activities due to commence / complete by 28 March 1999 (or are currently in progress and expected to complete after that date) is attached.
- The plan shows variances against the baselined plan (V7.0 status 18 January 1999).
- The plan shows activities on target (☺), activities forecast to complete up to 10 days later than planned (☹) and greater than 10 days (⊗).

**Bob Burkin**  
**HORIZON Planning Team**

Activity ID	Activity Description	Previous Start (15/2)	Forecast Start	Period Variance	Previous Finish (15/2)	Forecast Finish	Period Variance	Resp
<b>BACAPS</b>								
<b>NR2 Single Benefit</b>								
Live Trial								
POCL Live Trial (ChB Only)								
0388	Initiate Cards For 100 New Offices	15FEB99*	01MAR99*	-10			-10	AW
<b>HORIZON Implementation</b>								
<b>NR2 Single Benefit</b>								
Model Office to Release Authorisation								
Horizon Implementation								
POCL Commercial Decisions								
0093	Agreement To Modification Funding - Post Interim	26FEB99*	26MAR99*	-20			-20	MOT
0095	Agreement To Number Of Training Courses/Places	26FEB99*	12MAR99*	-10			-10	TR
0096	Migration Cost Apportionment	26FEB99*	26MAR99*	-20			-20	SG
Migration								
1C To NR2 Migration (Implementation View)								
Phase 1								
0456	Management Of Physical Upgrade 1c to NR2 outlets	29SEP98A	29SEP98A	0	26FEB99	05MAR99	-5	AJ
Live Trial								
Agreement With Pathway								
0496	Agreement On Process Of How To Manage Net Change	30NOV98A	30NOV98A	0	26FEB99	05MAR99	-5	MOT
Regional Implementation Deployment Process (LT)								
0500	Operational Readiness Review Of Infra. Process			-5	26FEB99*	05MAR99*	-5	MOT
Training (Live Trial)								
0519	(LT) Training Schedule And Report Process	25AUG97A	25AUG97A	0	26FEB99	15MAR99	-11	TR
HFSO Development								
0537	Develop And Agree HFSO Training Plan	03AUG98A	03AUG98A	0	26FEB99	12MAR99	-10	SG
National Rollout								
Migration Approach								
0646	HFSO Recruitment Complete For NRO	01MAR99*	25JUN99*	-83			-83	MOT
<b>HORIZON Product Assurance</b>								
<b>NR2 Single Benefit</b>								
Model Office to Release Authorisation								
Acceptance Trials / Reviews								
0214	Acceptance Trials	12OCT98A	05OCT98A	7	14FEB99A	04APR99	-49	JA
0492	Hold Inaugural JED Board	22FEB99*	01MAR99*	-5	26FEB99	05MAR99	-5	JW
Project Start	03NOV97	IPPS		Sheet 1A of 28				
Project Finish	18MAY01	Horizon Programme						
Data Date	01MAR99	Overdue Tasks Since Last Update						
Run Date	02MAR99	Data Date-1 March 99 ( Version 7.3)						
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Activity ID	Activity Description	Previous Start (15/2)	Forecast Start	Period Variance	Previous Finish (15/2)	Forecast Finish	Period Variance	Resp
<b>HORIZON Release Management</b>								
<b>NR2 Single Benefit</b>								
<b>Live Trial</b>								
<b>POCL Live Trial (ChB Only)</b>								
0393	Live Trial Detail Plan Agreed			-12	17FEB99*	05MAR99*	-12	NM
<b>HORIZON Service Management</b>								
<b>NR2 Single Benefit</b>								
<b>National Rollout</b>								
<b>Business Service Management</b>								
<b>BSM Processes</b>								
BSM 1	MaPEEC Decision On BSM Programme			-20	24FEB99*	24MAR99*	-20	MR
<b>HORIZON Testing</b>								
<b>NR2 Single Benefit</b>								
<b>Model Office to Release Authorisation</b>								
<b>End To End Tests (ChB / CAPS 3.0)</b>								
0141	End To End - Final Pass	15FEB99	15FEB99A	0	12MAR99	14MAR99	-2	RG
<b>ICL Pathway</b>								
<b>NR2 Single Benefit</b>								
<b>Model Office to Release Authorisation</b>								
<b>End To End Tests (ChB / CAPS 3.0)</b>								
0177	Pre-Proving	06JAN99A	06JAN99A	0	05FEB99A	07FEB99A	-2	AM
<b>Migration</b>								
<b>Migration - R1C to NR2 (Rel Management View)</b>								
<b>Phase 1</b>								
0306	NR2 Procedures Established (From Printers)			-1	26FEB99*	01MAR99*	-1	RS
<b>NR2 Single Benefit</b>								
<b>Model Office to Release Authorisation</b>								
<b>Live Ref Data Proving</b>								
<b>Data Validation</b>								
1476	Product To Outlet Mapping - LT	04NOV98A	04NOV98A	0	24FEB99	11MAR99	-11	BT

Activity ID	Activity Description	Forecast Start	Forecast Finish	Resp	1999											
					JAN	FEB	MAR	APR	MAY	JUN	J					
<b>BACAPS</b>																
<b>NR2 Single Benefit</b>																
<b>Model Office to Release Authorisation</b>																
<b>End To End Tests (ChB / CAPS 3.0)</b>																
0147	CAPS (Supporting End To End Testing Execution)	10AUG98A	12MAR99	AW	[Gantt bar from Jan to Feb] ☺											
0148	CAPS E2E Closure Report		12MAR99*	AW	[Gantt bar from Feb to Mar] ☺											
<b>Model Office - Joint (ChB / CAPS 3.0)</b>																
0182	CAPS (Supporting MO Testing Execution)	14SEP98A	12MAR99	AW	[Gantt bar from Jan to Feb] ☺											
0663	ChB / Nile 2 Seals Of Approval	09OCT98A	05MAR99	AW	[Gantt bar from Jan to Feb] ☺											
0183	CAPS MO Closure Report		12MAR99*	AW	[Gantt bar from Feb to Mar] ☺											
<b>Migration</b>																
<b>Migration - R1C to NR2 (Rel Management View)</b>																
<b>Overall Management Activity</b>																
0342	BA Confirm Appropriate Staff Trained	28DEC98A	12MAR99	AW	[Gantt bar from Jan to Feb] ☺											
<b>Live Trial</b>																
<b>POCL Live Trial (ChB Only)</b>																
0388	Initiate Cards For 100 New Offices	01MAR99*		AW	[Gantt bar from Feb to Mar] ☺											
<b>National Rollout</b>																
<b>CAPS</b>																
0655	National Card Roll-Out (ChB Only) - Planning	27APR98A	05JUL99	AW	[Gantt bar from Jan to Jun]											
0654	Prepare / Support ChB Live For CP Go Live	31AUG98A	10MAY99	AW	[Gantt bar from Jan to May] ☺											
<b>HORIZON Implementation</b>																
<b>NR2 Single Benefit</b>																
<b>Model Office to Release Authorisation</b>																
<b>Horizon Implementation</b>																
<b>POCL Business Decisions</b>																
0085	Receipt Of Approach-Ongoing Steady State Train.	15MAR99*		TR	[Gantt bar from Feb to Mar] ☺											

Project Start 03NOV97  
 Project Finish 18MAY01  
 Data Date 01MAR99  
 Run Date 01MAR99

Early Bar  
 Progress Bar  
 Critical Activity

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IPPS

**Horizon Programme**

STG - Level 0/1 - 4 Week Look Ahead

Data Date - 1 March 99 (Version 7.3)

Sheet 1A of 10B

>10 days behind schedule  
 <10 days behind schedule  
 On schedule  
 Complete



Activity ID	Activity Description	Forecast Start	Forecast Finish	Resp	1999							
					JAN	FEB	MAR	APR	MAY	JUN	J	
<b>Migration Approach</b>												
0649	Dev/Agree Outlet Migration Strategy For ALPs	14DEC98A	28MAY99	SG								☺
0648	Agree HFSO Turnover Strategy	24MAR99*		MOT			◆	☺				
<b>HORIZON Product Assurance</b>												
<b>NR2 Single Benefit</b>												
<b>Model Office to Release Authorisation</b>												
<b>Model Office - Joint (ChB / CAPS 3.0)</b>												
0246	Issue Model Office Test Accept Report to JAB		26MAR99*	JA			◆	☺				
<b>Develop / Approve Acceptance Specs</b>												
0221	Sign-Off BPS Service Boundary Accept Spec	23NOV98A	22MAR99	JA								☹
0230	HORIZON Approval of Tranche 2 Accept Specs	25MAR99*		JA			◆	☹				
<b>Acceptance Trials / Reviews</b>												
0216	Acceptance Reviews	04FEB99A	04JUN99	JA								☺
0492	Hold Inaugural JED Board	01MAR99*	05MAR99	JW								
<b>HORIZON Reference Data</b>												
<b>NR2 Single Benefit</b>												
<b>Model Office to Release Authorisation</b>												
<b>Reference Data</b>												
<b>NR2 Reference Data Developed &amp; Supported</b>												
0025	E2E Supported	23SEP98A	12MAR99	PK								☺
0035	MOT Supported	28DEC98A	10MAR99	PK								☺
0032	Outlet Data Quality Complete		12MAR99*	PK			◆	☺				
0033	Accounting Data Quality Complete		12MAR99*	PK			◆	☺				
0034	Data Feed To BA Complete		12MAR99*	PK			◆	☺				
0044	Product Data Quality Complete		12MAR99*	PK			◆	☺				
0052	Software Version 6.3 Go Live		26MAR99*	PK			◆	☺				
0757	Infrastructure (Business Continuity) In Place		28MAR99*	PK			◆	☺				

Activity ID	Activity Description	Forecast Start	Forecast Finish	Resp	1999							
					JAN	FEB	MAR	APR	MAY	JUN	J	
<b>HORIZON Release Management</b>												
<b>NR2 Single Benefit</b>												
<b>Model Office to Release Authorisation</b>												
<b>Release Authorisation</b>												
0254	POCL Support Systems Ready For LT (RAB Report)		12MAR99*	AS			◆☺					
0252	Business Ready to accept change to live outlets	15MAR99*		AS			◆☺					
0515	Contingency Target Test	15MAR99	02APR99	AS			◆☺					
<b>Migration</b>												
<b>Migration - R1C to NR2 (Rel Management View)</b>												
<b>Overall Management Activity</b>												
0297	Sign Off Pathway Approach Document		05MAR99*	RS			◆☹					
0305	Sign-Off PID - Migration Stage		08MAR99*	RS			◆☹					
<b>Live Trial</b>												
<b>POCL Live Trial (ChB Only)</b>												
0393	Live Trial Detail Plan Agreed		05MAR99*	NM			◆☹					
<b>HORIZON Service Management</b>												
<b>NR2 Single Benefit</b>												
<b>National Rollout</b>												
<b>Business Service Management</b>												
<b>BSM Processes</b>												
BSM 30	Migration Of Outlets - Stage 2 NRO	03NOV98A	31AUG99	MR								
BSM 28	Migration Of Outlets From Imp To OSM-Stage 1 LT	15DEC98A	14MAY99	MR							☺	
BSM 34	Before & After Procedures (User Guides etc)	15DEC98A	17MAY99	MR							☺	
BSM 2	BSM Development - Tactical Stage (RAB)	18DEC98A	01APR99	MR							☺	
BSM 3	BSM Dev-Strategic Stage(HORIZON Enabling Act's)	18DEC98A	30JUL99	MR								
BSM 4	BSM Dev-Strategic Stage(HORIZON BU Planning)	18DEC98A	26MAY99	MR							☺	
BSM 5	BSM Dev-Strategic Stage(HORIZON BU Dev & Imp)	18DEC98A	21JUL99	MR								
BSM 24	Implement SM Processes	25JAN99A	09AUG99	MR								
BSM 32	HORIZON Usability Trial	15FEB99A	16APR99	MR							☺	
BSM 1	MaPEC Decision On BSM Programme		24MAR99*	MR							◆☹	

Activity ID	Activity Description	Forecast Start	Forecast Finish	Resp	1999						
					JAN	FEB	MAR	APR	MAY	JUN	J
<b>Support Centre Live Trial</b>											
BSM 35	Prepare For Support Centre Live Trial	26NOV98A	12APR99	MR							☺
<b>Secondary Site Support Centre</b>											
BSM 38	Set Up Secondary Site Support Centre	30OCT98A	25AUG99	MR							
<b>Primary Site Support Centre</b>											
BSM 40	Identify/Design/Build/Modify Primary Site	30OCT98A	07OCT99	MR							
<b>Conformance</b>											
BSM 44	CEC Agree Conformance Plans		01MAR99*	MR			◆				☺
<b>BSM PROGRAMME MANAGEMENT</b>											
<b>MaPEC DECISION / HR - COMMS PLAN</b>											
BSM 51	DEVELOP AND IMPLEMENT COMMUNICATIONS PLAN	05OCT98A	31DEC99	MR							
BSM 61	DEVELOP & IMPLEMENT BSM ORGANISATIONAL STRUCTURE	13OCT98A	31DEC99	MR							
BSM 57	IMPLEMENT RESOURCE STRATEGY FOR SECONDARY SITE	19OCT98A	03SEP99	MR							
BSM 52	DEVELOP RESOURCING STRATEGY	18NOV98A	31MAR99	MR							☺
BSM 53	DEVELOP TRAINING STRATEGY	13JAN99A	30JUN99	MR							
<b>CURRENT OPERATIONS</b>											
<b>IMPLEMENT SM PROCESS</b>											
BSM 83	SERVICE REVIEW (INC PERFORMANCE REPORTS & MIS)	18DEC98A	01APR99	MR							☺
BSM 80	KNOWN PROBLEM REGISTER	25JAN99A	31MAR99	MR							☺
BSM 108	LESSONS LEARNED FROM LIVE TRIAL	15MAR99*	09AUG99	MR							
<b>MIGRATION OF OUTLETS STAGE1 LIVE TRIAL</b>											
BSM 138	IMPLEMENT	29JAN99A	14MAY99	MR							☺
<b>MIGRATION OF OUTLETS - STAGE 2 - NRO</b>											
BSM 140	REVIEW STAGE 1 MIGRATION PROCESS	03NOV98A	31MAR99	MR							☺
BSM 142	IDENTIFY IMPROVEMENT OPPORTUNITIES	03NOV98A	31MAR99	MR							☺
BSM 146	DEFINE INTERFACE WITH NRO DATABASE	25JAN99A	31AUG99	MR							
<b>HORISON USABILITY TRIAL</b>											
BSM 154	MONITOR & MEASURE IMPACT ON OUTLET	08FEB99A	08MAR99	MR							☺
BSM 156	PRODUCE OSM USABILITY TRIAL REPORT	12MAR99*	26MAR99	MR							☺
<b>BEFORE &amp; AFTER PROCEDURES</b>											
BSM 168	IMPLEMENT PLAN	08JAN99A	17MAY99	MR							☺

Activity ID	Activity Description	Forecast Start	Forecast Finish	Resp	1999						
					JAN	FEB	MAR	APR	MAY	JUN	J
<b>DEVELOPMENT</b>											
<b>BSM DEVELOPMENT - TACTICAL STAGE (RAB)</b>											
BSM 201	INCIDENT MANAGEMENT	18DEC98A	11MAR99	MR							
BSM 206	PROBLEM MANAGEMENT	18DEC98A	05MAR99	MR							
BSM 210	CHANGE MANAGEMENT	18DEC98A	01APR99	MR							
BSM 212	BUSINESS CONTINUITY	18DEC98A	01APR99	MR							
BSM 200	SERVICE MANAGEMENT ASSURANCE GROUP	18FEB99A	15MAR99	MR							
<b>BSM DEV - STRATEGIC STAGE (HORIZON ENABLING ACT)</b>											
BSM 216	INDUCT B.U. CHAMPIONS	18DEC98A	30JUL99	MR							
BSM 220	REVIEW FRAMEWORK DOCUMENTS	18DEC98A	23APR99	MR							
BSM 222	PRODUCE HIGH LEVEL PROCESS DESCRIPTIONS	18DEC98A	08APR99	MR							
BSM 224	PRODUCE GENERIC DETAILED PROCESS DESCRIPTIONS	18DEC98A	08APR99	MR							
BSM 226	BASELINE SERVICE CONFIGURATION	31DEC98A	11MAR99	MR							
<b>BUS DEV - STRATEGIC STAGE ( HORIZON BU PLANNING)</b>											
BSM 228	PLANNING WORKSHOPS WITH BU CHAMPIONS	18FEB99A	03MAR99	MR							
BSM 230	PRODUCE BU DEVELOPMENT & IMPLEMENTATION PLANS	04MAR99*	31MAR99	MR							
BSM 232	BU's IDENTIFY & APPOINT RESOURCES	04MAR99*	26MAY99	MR							
BSM 234	BSM DEVELOPMENT - PROJECT SUPPORT	04MAR99*	26MAY99	MR							
<b>BSM DEV - STRATEGIC STAGE (HORIZON BU DEV &amp; IMP)</b>											
BSM 238	BU's PRODUCE WORKING LEVEL PROCEDURES	18DEC98A	21JUL99	MR							
<b>BSM DEV-STRATEGIC STAGE (INTEGRATION)</b>											
BSM 246	INPUT TO DETAILED BUSINESS REQ'T DEFINITION	04JAN99A	29SEP99	MR							
BSM 250	PARTICIPATE IN PRODUCT EVALUATION	04JAN99A	26MAR99	MR							
BSM 256	BSM DEVELOPMENT - USER INPUT	04JAN99A	31DEC99	MR							
BSM 248	INPUT TO FULL TOOL-SET SPECIFICATION	01FEB99A	24SEP99	MR							
<b>SUPPORT CENTRE - LIVE TRIAL</b>											
<b>STAGE 1 - LIVE TRIAL</b>											
BSM 340	DEVELOP PROCESSES	04JAN99A	23MAR99	MR							
BSM 330	ENHANCE EXISTING TECHNOLOGY	06JAN99A	06APR99	MR							



Activity ID	Activity Description	Forecast Start	Forecast Finish	Resp	1999						
					JAN	FEB	MAR	APR	MAY	JUN	J
<b>Interim TIP</b>											
<b>NR2 Single Benefit</b>											
Model Office to Release Authorisation											
End To End Tests (ChB / CAPS 3.0)											
0144	Interim TIP Supporting E2E Testing	10AUG98A	02APR99	CW	██████████						☺
Model Office - Joint (ChB / CAPS 3.0)											
0180	Interim TIP Supporting MO Testing	10AUG98A	02APR99	CW	██████████						☺
<b>POCL Chesterfield</b>											
<b>NR2 Single Benefit</b>											
Model Office to Release Authorisation											
End To End Tests (ChB / CAPS 3.0)											
0145	CBDB Supporting MO Testing	10AUG98A	02APR99	CW	██████████						☺
0146	APACHI Supporting MO Testing	10AUG98A	02APR99	CW	██████████						☺
Model Office - Joint (ChB / CAPS 3.0)											
0178	CBDB Supporting MO Testing	10AUG98A	02APR99	CW	██████████						☺
0179	APACHI Supporting MO Testing	10AUG98A	02APR99	CW	██████████						☺
<b>POOSG</b>											
<b>NR2 Single Benefit</b>											
Model Office to Release Authorisation											
End To End Tests (ChB / CAPS 3.0)											
0143	HAPS Supporting E2E Testing	10AUG98A	02APR99	OSG	██████████						☺
Model Office - Joint (ChB / CAPS 3.0)											
0181	HAPS Supporting MO Testing	11AUG98A	02APR99	OSG	██████████						☺
<b>HAPS</b>											
Support											
0064	Host Technical Support	02NOV98A	05MAR99	OSG	██████████						☺

Activity ID	Activity Description	Forecast Start	Forecast Finish	Resp	1999							
					JAN	FEB	MAR	APR	MAY	JUN	J	
<b>ICL Pathway</b>												
<b>NR2 Single Benefit</b>												
<b>Model Office to Release Authorisation</b>												
<b>Joint Testing</b>												
0124	Security Regression	28SEP98A	04APR99	AM								☺
<b>Model Office - Joint (ChB / CAPS 3.0)</b>												
0161	NR2 PPD's v 0.6 - Test & Re-Work	01FEB99A	05MAR99	AM								☺
0175	Complete Training Contents Sign-Offs		12MAR99*	AM								☺
<b>Migration</b>												
<b>Migration - R1C to NR2 (Rel Management View)</b>												
<b>Phase 1</b>												
0306	NR2 Procedures Established (From Printers)		01MAR99*	RS								☹
0309	Operational Procedures Established		12MAR99*	RS								☺
<b>Phase 2</b>												
0311	Undertake Upgrade Rehearsals (Phase 2)	02NOV98A	07MAY99	RS								☺
<b>Overall Management Activity</b>												
0387	Ensure 1999/2000 C/A Available At Counter		25MAR99*	RS								☺
<b>Live Trial</b>												
<b>POCL Live Trial (ChB Only)</b>												
0392	Commence User Awareness Events	01MAR99		AM								☺
0414	Operational Preparation For Live Trial	15MAR99*	24APR99	AM								☺
<b>National Rollout</b>												
<b>CAPS</b>												
0653	Pathway R2 Implementation Approach Doc Received		26FEB99*	AM								☹
<b>NR2 Single Benefit</b>												
<b>Model Office to Release Authorisation</b>												
<b>Live Ref Data Proving</b>												
<b>Operational Change Control</b>												
<b>APS Client Take-On</b>												
1506	Carry Out Client Take On Backlog During Testing	18JAN99A	23MAR99	BT								☹

Activity ID	Activity Description	Forecast Start	Forecast Finish	Resp	1999							
					JAN	FEB	MAR	APR	MAY	JUN	J	
<b>Data Validation</b>												
<b>Validate Data At RDS</b>												
1476	Product To Outlet Mapping - LT	04NOV98A	11MAR99	BT			☹					
<b>Validate Baseline At Counter</b>												
1526	Cash Account Validation (Another Run)	15MAR99*	26MAR99	BT			☹					

TO: POCL Horizon Management Team

Copy PMO Team

FROM Dara Forde

DATE: 7 Jan. 1999

SUBJECT: HORIZON MANAGEMENT TEAM MEETING

Please find attached the actions from HMT of 6 Jan. The next meeting is 09.30-12.30 on Wed. 13 January at ICL Pathway Boardroom.

The focus of this meeting is on overall programme progress exceptions and issues for escalation to Pathway Checkpoint and POCL Programme Board.

AGENDA for 13 Jan.

- 1) Actions follow-up
- 2) Team Performance against Level 1 Plan - exceptions only  
Brief update only on any new Issue since last HMT.
- 3) Programme Issues Register  
Review progress on Programme Issues.
- 4) Programme Issues & Risks for escalation to Programme Board  
HMT to agree the top Programme Issues & Risks for escalation to the POCL Programme Board for assistance or information.
- 5) Revised Plan for Single Benefit Testing, Live Trial and National Roll-Out  
Review Critical Path Plan for submission to CAPs & CARDS Programme Board with particular emphasis on preparations of Business Service Management, Implementation and Acceptance.

6) Communications matters arising from meeting

- 7) AOB. → Politics. *officials meeting - no minutes meeting, 3rd way which is no card but large boardroom.*
- Consideration of the 3rd way.

Dara → people / organisation — ICL Pathway

— POCL

— joint working