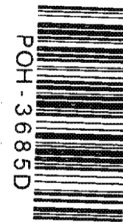


HORIZON SYSTEM

Counter Managers Training Event

Welcome



PATII/042/003 Ver 1.0

Slide CMI

HORIZON SYSTEM

Counter Assistants

Training Event

Welcome



PATH/042/003 Ver 1.0

Slide CA1

COURSE OBJECTIVES

By the end of the course you will:-

- Have an awareness of the Horizon system functions.
- Be able to navigate the system.
- Know and be able to use the support materials available.
- Have a level of comfort with the Horizon system, to enable you to carry out your everyday business transactions on return to your Post Office.



AGENDA

- Introduction 9.00 - 9.10
- Getting started & Sales 9.10 - 10.45
- Coffee 10.45 - 11.00
- Sales & Benefit Payments 11.00 - 12.30
- Lunch 12.30 - 13.30
- Benefit Payments (continued) 13.30 - 14.45
- Automated Payments 14.45 - 15.15
- Coffee 15.15 - 15.30
- Functions & Help + Basic Maintenance 15.30 - 17.00
- Roleplay 17.00 - 17.40
- Performance Standard Assessment 17.40 - 18.00



AGENDA - DAY 1

- Introduction 9.00 - 9.10
- Getting started & Sales 9.10 - 10.45
- Coffee 10.45 - 11.00
- Sales & Benefit Payments 11.00 - 12.30
- Lunch 12.30 - 13.30
- Benefit Payments (continued) 13.30 - 14.30
- Automated Payments 14.30 - 15.00
- Coffee 15.00 - 15.15
- Functions 15.15 - 16.00
- Roleplay 16.00 - 17.00



AGENDA DAY 2

- Introduction 9.00 - 9.10
- Help & Basic Maintenance 9.10 - 9.30
- Office Set Up 9.30 - 10.00
- Balancing (Shared Stock Unit) 10.00 - 11.00
- Coffee 11.00 - 11.15
- Balancing (Individual Stock Unit) 11.15 - 12.30
- Role Play & Performance Standard Assessment 12.30 - 13.30



OBJECTIVES - Workbook 1

By the end of this workbook you will be able to:-

- Identify the Hardware components which make up the Horizon system.
- Get Started on the Horizon system.
- Move around the Horizon system.



THE KEYBOARD

Smart Card
Reader

Magnetic Swipe
Card Reader

Typing
Area

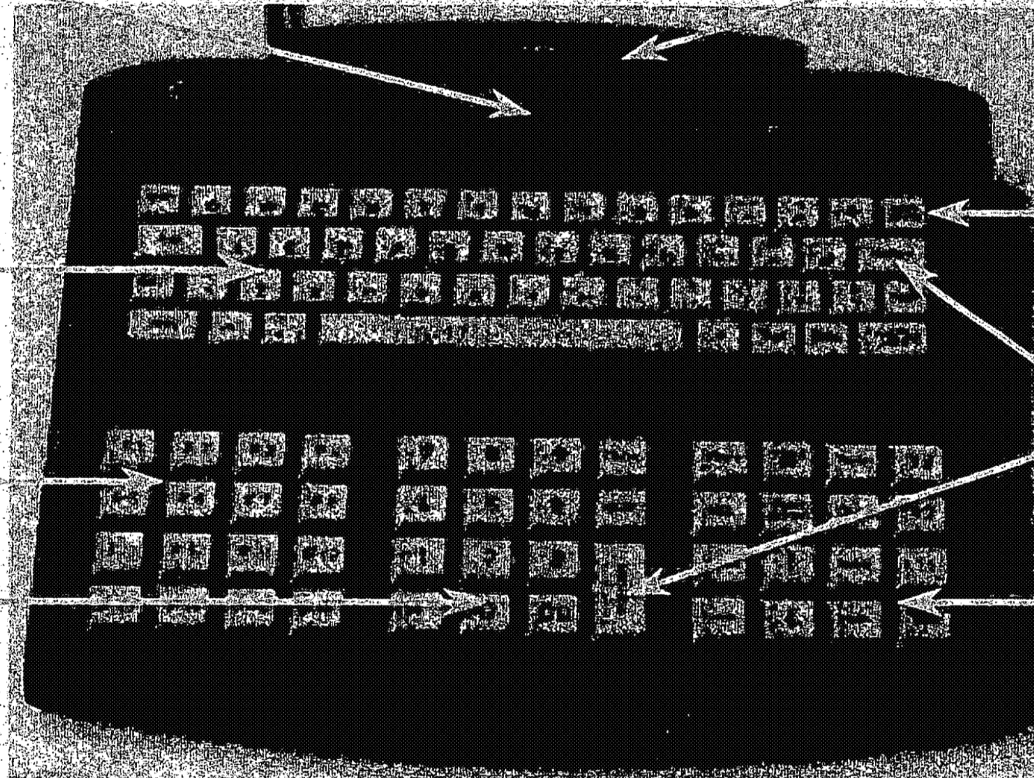
Backspace
Key

F-Keys

Enter
Keys

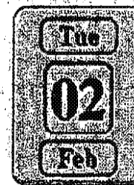
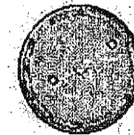
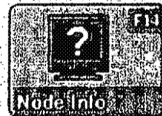
Number
Keys

Command
Keys



DESKTOP MENU

Expo[®]
© 1995-1998 Exabyte Group Ltd



Stock: AA

User: CHA001

(Individual)


CAP 11 / BP 01





PATH/042/003 Ver 1.0


Slide CM7 - CA6


SERVE CUSTOMER MENU




Desktop Home



Quantity 1



Bin Del



Info Help



Susp




 Tue
02
Feb


 Transactions

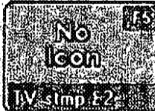
 Serve Customer



F1
1st class stamp



F2
2nd class stamp



F3
Postage stamp



F4
Stamp Book



F5
No icon
TV stamp £2



F6
BT stamp £2



F7
Postal Orders



F8
Local Schemes



F9
Colour TV lic



F10
BT bill pymt

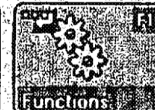

F11
Trans cash
licsh giro


F12
Green giro


F13
Other Products


F14
No icon
N Ireland


F15
Cash


F16
Functions

Stock: AA

User: CMA001







(Individual)


CAP 11 / BP 01


Serve Customer











OTHER PRODUCTS MENU










Transactions



Other Products











Stock: AA
User: CMA001
(Individual)
CAP 11 / EP 01
Serve Customer



SERVE CUSTOMER MENU

Navigation Exercise

Using the Horizon system, find the menu groups where you can see icons for the following products:-

Rent Vouchers

Mono TV Licence

Sun Alliance Insurance Policies

Saving Certificates

E111 Application Forms



OBJECTIVES - Workbook 1

By the end of this workbook you will be able to:-

- Identify the Hardware components which make up the Horizon system.
- Get Started on the Horizon system.
- Move around the Horizon system.



OBJECTIVES - Workbook 2

By the end of this workbook you will be able to:-

- Describe the Settlement options of the Horizon system.
- Complete single and multiple EPOSS sale transactions using the Horizon system.
- Complete EPOSS transactions using the Quantity & Undo functions and register mixed payment's.

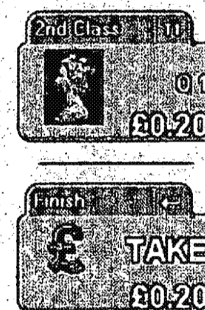


SETTLEMENT MENU



Transactions

Settlement



Serve Customer



OBJECTIVES - Workbook 2

By the end of this workbook you will be able to:-

- Describe the Settlement options of the Horizon system.
- Complete single and multiple EPOSS sale transactions using the Horizon system.
- Complete EPOSS transactions using the Quantity & Undo functions and register mixed payment's.



OBJECTIVES - Workbook 3

By the end of this workbook you will be able to:-

- Complete single & multiple transactions from the Licenses, National Savings and GiroBank groups.
- Encash Green Giro benefit with milk tokens.



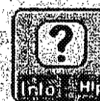
OBJECTIVES - Workbook 4

By the end of this workbook you will be able to:-

- Complete EPOSS Scales transactions.



SELECT A SERVICE



Select a service (80 grammes):

Inland Second	£10.31
Inland Parcel	£22.70
Special Delivery £250	£3.20
Inland First	£0.33

Page 1 of 1



Serve Customer



OBJECTIVES - Workbook 4

By the end of this workbook you will be able to:-

- Complete EPOSS Scales transactions.



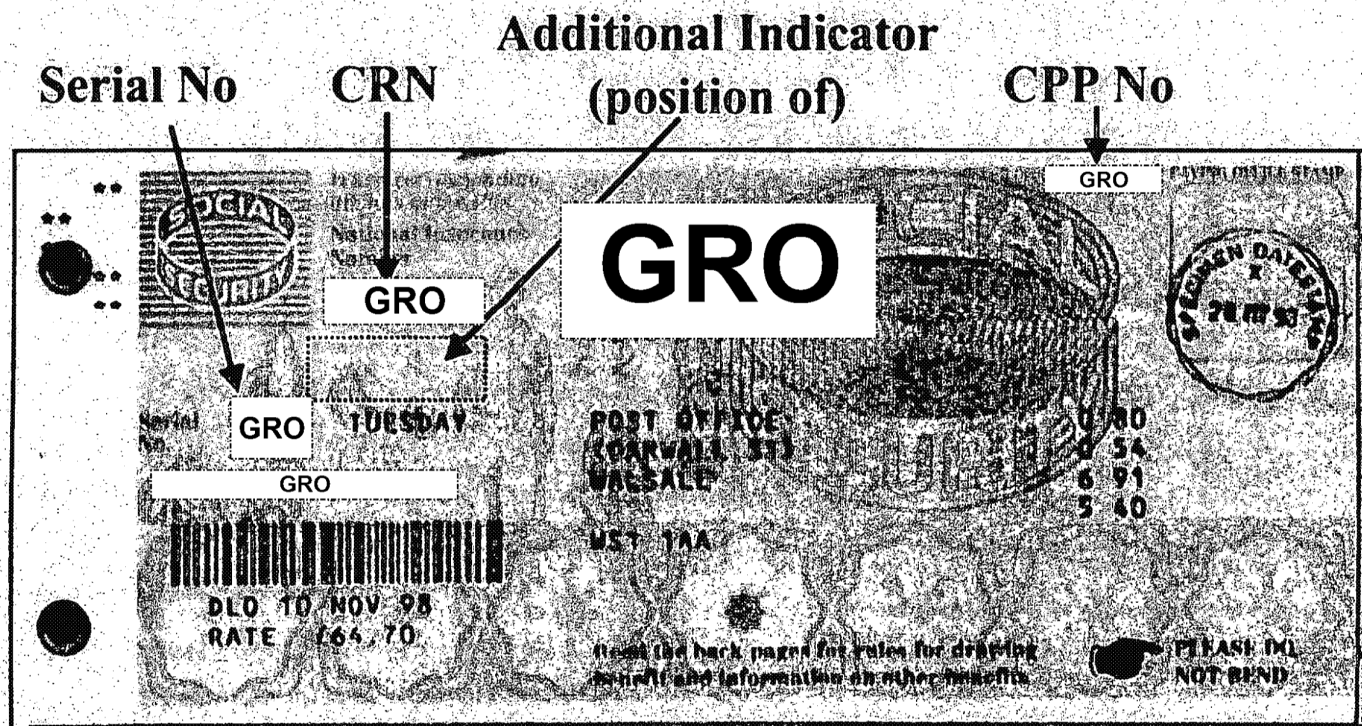
OBJECTIVES - Workbook 5

By the end Section 1 - OBCS you will be able to:-

- Receive & Issue bar-coded order books using the Horizon system.
- Encash foils from bar-coded and non bar-coded order books.
- Encash foils from bar-coded order books, manually entering the book details after a bar-code reader failure.



BAR-CODED ORDER BOOK



OBJECTIVES - Workbook 5

By the end Section 1 - OBCS you will be able to:-

- Receive & Issue bar-coded order books using the Horizon system.
- Encash foils from bar-coded and non bar-coded order books.
- Encash foils from bar-coded order books, manually entering the book details after a bar-code reader failure.



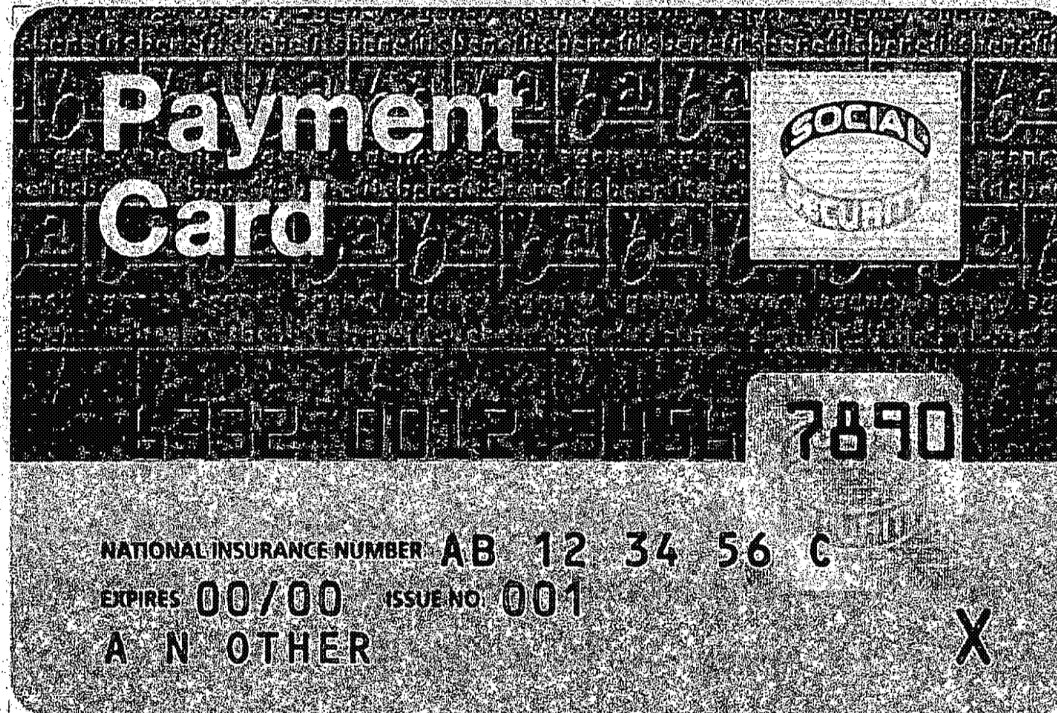
OBJECTIVES - Workbook 5

By the end of Section 2 - BES you will be able to:-

- Reconcile payment cards using the Horizon system.



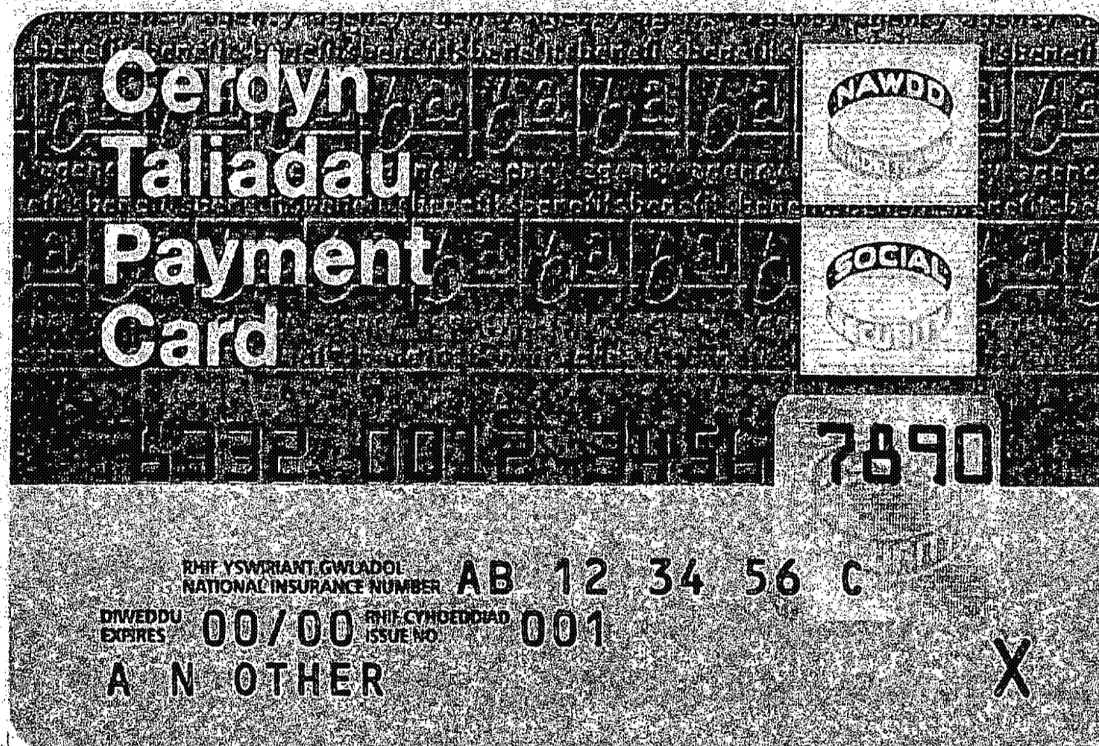
PAYMENT CARD



PATH/042/003 Ver 1.0

Slide CM23 - CA22

PAYMENT CARD



PATH/042/003 Ver.1.0

Slide CM24 - CA23

PAYMENT CARD

**Payment
Card**



6332 0112 3456 7890

NATIONAL INSURANCE NUMBER AB 12 34 56 0

EXPIRES 00/00 ISSUE NO. 001

A N OTHER

X



ICL

PAT11/042/003 Ver 1.0

Slide - CM25 - CA24

OBJECTIVES - Workbook 5

By the end of Section 2 - BES you will be able to:-

- Reconcile payment cards using the Horizon system.



OBJECTIVES - Workbook 5

By the end of Section 3 - BES you will be able to:-

- Issue payment cards to the customer, on production of a Pick Up Notice (PUN) using the Horizon system.
- Issue payment cards to the customer, manually entering the Pick Up Notice (PUN) details after a bar-code reader failure.
- Impound a suspicious PUN.



PAYMENT CARD ACTIVATION

Activate the following payment cards:-

- | | |
|-------------------|---------|
| • Theresa Douglas | Batch 2 |
| • Helena Craven | Batch 3 |
| • Laura Connor | Batch 3 |
| • Rose Mann | Batch 3 |



OBJECTIVES - Workbook 5

By the end of Section 3 - BES you will be able to:-

- Issue payment cards to the customer, on production of a Pick Up Notice (PUN) using the Horizon system.
- Issue payment cards to the customer, manually entering the Pick Up Notice (PUN) details after a bar-code reader failure.
- Impound a PUN.



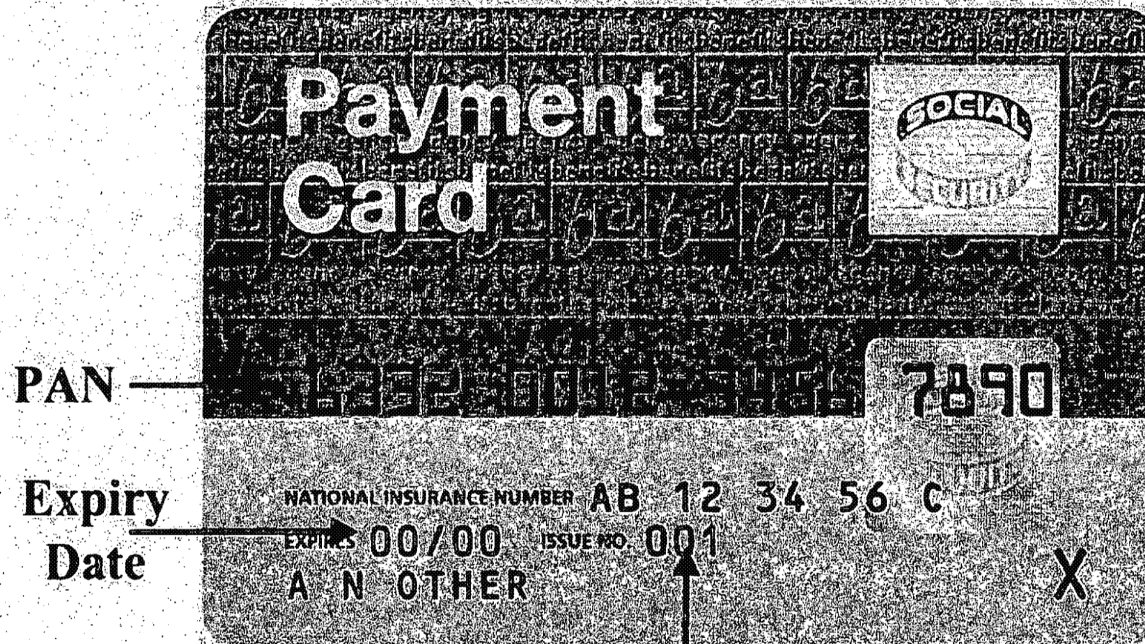
OBJECTIVES - Workbook 5

By the end of Section 4 - BES you will be able to:-

- Carry out encashment of benefit using the payment cards on the Horizon system.



PAYMENT CARD



Issue
Number

PATH/042/003 Ver 1.0

Slide - CM31 - CA30

OBJECTIVES - Workbook 5

By the end of Section 4 - BES you will be able to:-

- Carry out encashment of benefit using the payment cards on the Horizon system.



OBJECTIVES - Workbook 5

By the end of Section 5 - BES you will be able to:-

- Recognise a Temporary Token.
- Carry out the encashment of Temporary Token (TT) benefit.




TEMPORARY TOKEN

<p>Token Issue Details</p> <p>Customer Name Address Postcode Country</p>	<p>Customer Information</p> <p>Customer Name Customer Address Customer Postcode Customer Country</p>	<p>Temporary Payment Card Cerbyd Tachiau Dros Ddy</p> <p>Serial number 012 345 678</p> <p>This card is valid for use as a temporary payment card. It is not valid for use as a permanent payment card. It is not valid for use as a credit card.</p> <p>Cardholder Name Cardholder Address Cardholder Postcode Cardholder Country</p> <p>Cardholder Signature Cardholder Date</p>
---	---	---




TEMPORARY TOKEN

 **Temporary Payment Card** Serial number: **GRO**


This document is a receipt for a temporary payment card.
For conditions of use see internet.

Acknowledged receipt of the Temporary Payment Card

Customer Name: **GRO** Customer number: **P. Jackson**

ISS
 **Stamp**

Issued **12/11/98**


982611000000000085



OBJECTIVES - Workbook 5

By the end of Section 5 - BES you will be able to:-

- Recognise a Temporary Token.
- Carry out the encashment of Temporary Token (TT) benefit.



OBJECTIVES - Workbook 6

By the end of this workbook you will be able to:-

- Complete APS Magnetic Card and Bar-coded Bill payments.



OBJECTIVES - Workbook 6

By the end of this workbook you will be able to:-

- Complete APS Magnetic Card and Bar-coded Bill payments.
- Reverse an APS transaction.
- Understand the procedure to recover transactions after a system or communications failure.



APS CARD

PAN → 9826900015012221501

TRAINING CARD

Service
Code

01 TRG P

22215

LOCAL
APS05



OBJECTIVES - Workbook 6

By the end of this workbook you will be able to:-

- Complete APS Magnetic Card and Bar-coded Bill payments.



OBJECTIVES - Workbook 6

By the end of this workbook you will be able to:-

- Complete APS Magnetic Card and Bar-coded Bill payments.
- Reverse an APS transaction.
- Understand the procedure to recover transactions after a system or communications failure.



OBJECTIVES - Workbook 7

By the end of this workbook you will be able to:-

- Recognise and perform actions from the functions menu.




OBJECTIVES - Workbook 7


By the end of this workbook you will be able to:-


- Recognise and perform actions from the functions menu.
- Perform transaction reversals.
- Register miscellaneous transactions.





FUNCTIONS MENU



Serve Customer Home



Quantity



Prev. Esc



Bin. Del



Info. Hlp



Susp.


 Transactions


 Functions



PLU No.



Receipt



Disc. Item 2



Disc. Item Value



PLU list



Reprint Receipt



Disc. Sess Value




Disc. Sess 2


Qty Shop


Test Printer


Temp Lock


Settlement



 Tue
02
Feb

Stock: AA

User: CHA001

(Individual)

CAP 11 / BP 01

Serve Customer



OBJECTIVES - Workbook 7

By the end of this workbook you will be able to:-

- Recognise and perform actions from the functions menu.



OBJECTIVES - Workbook 7

By the end of this workbook you will be able to:-

- Recognise and perform actions from the functions menu.
- Perform transaction reversals.
- Register miscellaneous transactions.



OBJECTIVES - Workbook 8

By the end of this workbook you will be able to:-

- Access the Help facilities available.

**UNDER NO CIRCUMSTANCES ARE USERS TO PERFORM ANY OTHER
MAINTENANCE TASKS OTHER THAN THOSE DESCRIBED**



OBJECTIVES - Workbook 8

By the end of this workbook you will be able to:-

- Access the Help facilities available.
- Follow correct procedures in the event of system or component failure.
- Install consumables for the Horizon system.

**UNDER NO CIRCUMSTANCES ARE USERS TO PERFORM ANY OTHER
MAINTENANCE TASKS OTHER THAN THOSE DESCRIBED**



AGENDA DAY 2

- Introduction 9.00 - 9.10
- POLO, Help & Basic Maintenance 9.10 - 9.30
- Office Set Up 9.30 - 10.20
- Balancing (Shared Stock Units) 10.20 - 11.00
- Coffee 11.00 - 11.15
- Balancing (Individual Stock Units) 11.15 - 12.30
- Role Play & Performance Standard Assessment 12.30 - 13.30



OBJECTIVES - Workbook 9

By the end of this section you will be able to:-

- Use the Post Masters Memory Card (PMMC) to connect the office to the Horizon network service.



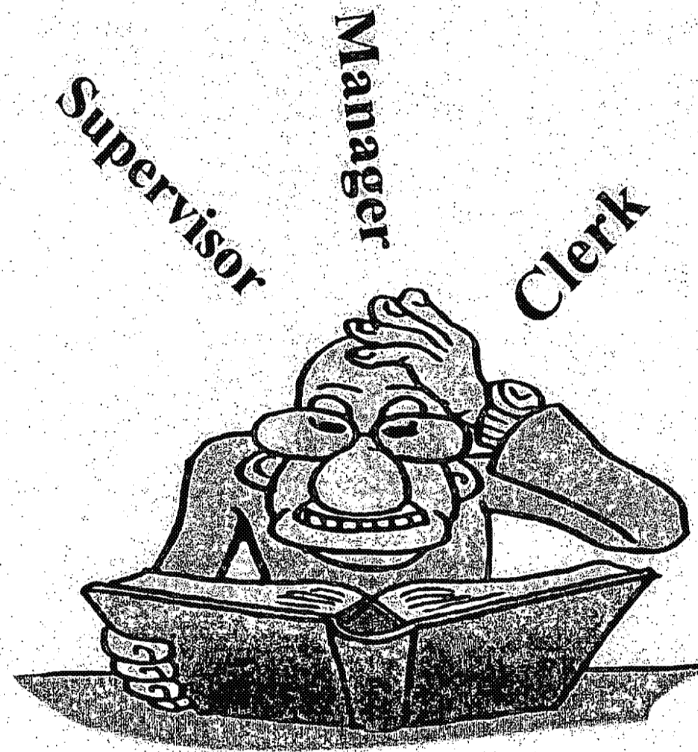
OBJECTIVES - Workbook 9

By the end of this workbook you will be able to:-

- Add, modify and delete users.
- Understand the different types of stock unit used on the Horizon system
- Create stock units.
- Attach users to a stock units.
- Complete Remittances In or Out of the office.
- Complete a Transfer between two stock units.



User Groups on Horizon

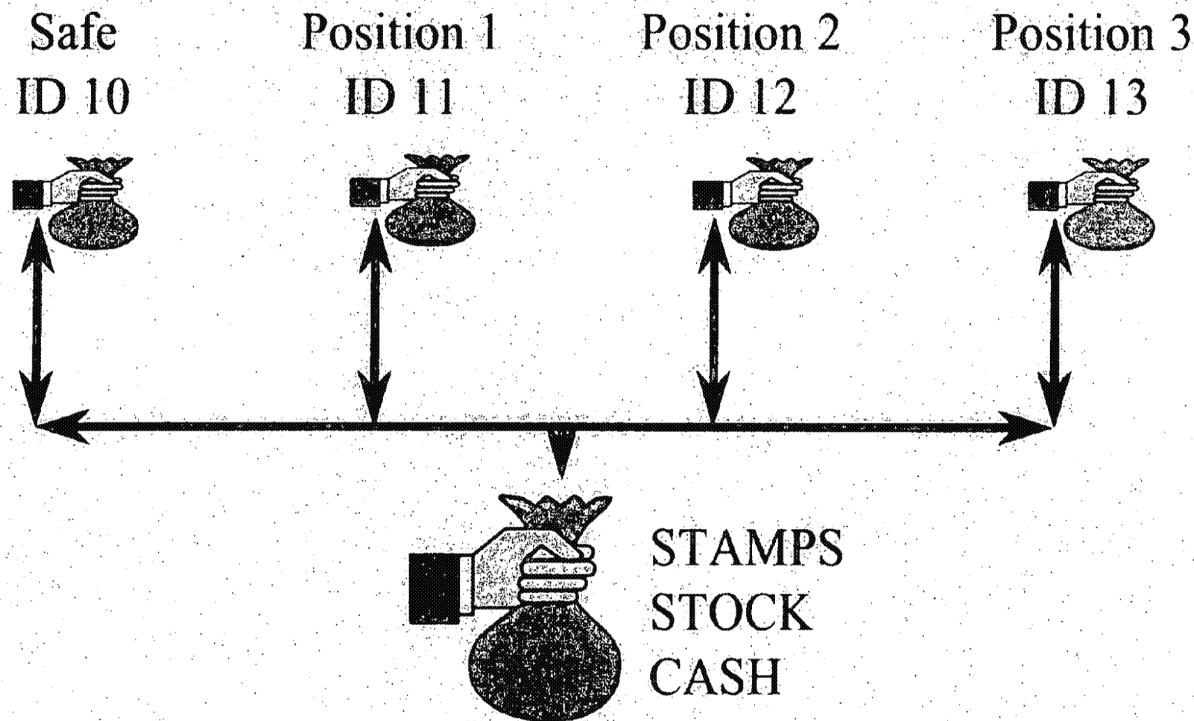


User Groups - Description

- **Clerk**
Can access all EPOSS functions and can balance SUs on the Horizon system.
- **Supervisor**
Can access all EPOSS functions and complete an office balance, cannot change access levels or groups for users.
- **Manager**
Can access all EPOSS functions and complete an office balance, can change access levels or groups for users.



SHARED STOCK UNIT



SHARED STOCK UNIT

- A user attached to a shared SU is responsible for an element of the office stock as a whole.
- More than one user may be attached to and using a shared stock unit at the same time. However during the balance process only the user responsible for balancing can be logged on.
- The SU segment has a unique identity number (allocated by the manager).
- The identifier for the SU is the same for all the segments and is visible on the screen in the bottom right corner.



INDIVIDUAL STOCK UNIT

Position 1
SU AA



+

Position 2
SU BB



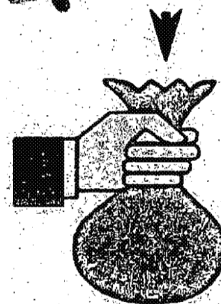
+

Position 3
SU CC



+

Position 4
SU DD



STAMPS
STOCK
CASH

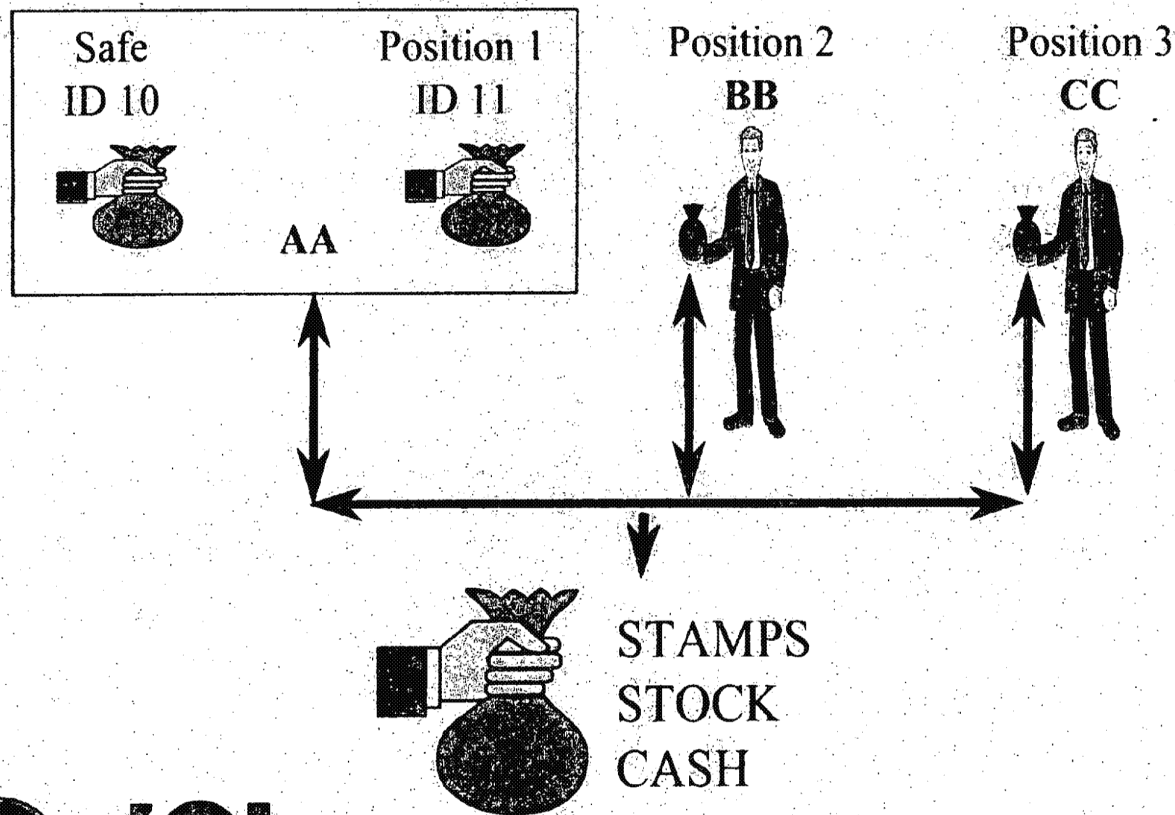


INDIVIDUAL STOCK UNIT

- A user allocated to an Individual SU has a responsibility for the stock and cash in their stock unit.
- Only one user may be attached to an individual stock unit at any one time.
- If:
STAMPS, STOCK or CASH are moved between users (with individual stock units) then a **transfer must be completed** by both users.



Mixed Stock Unit Set-Up



OTHER STOCK UNITS

- **Default Stock Unit**

A system maintained holding area, if users are attached to the default SU they will not be able to use EPOSS.

- **Inactive Stock Unit**

An inactive SU is a SU which has not completed any transactions since the last Stock Unit Balance.

- **Correction Stock Unit**

Created to hold a discrepancy found after the office balance has been completed but before the Cash Account is printed.



OBJECTIVES - Workbook 9

By the end of this workbook you will be able to:-

- Add, modify and delete users.
- Understand the different types of stock unit used on the Horizon system
- Create stock units.
- Attach users to a stock units.
- Complete Remittances In/Out of the office.
- Complete a Transfer between two stock units.



OBJECTIVES - Workbook 10

By the end of Section 1 - Shared SU, you will be able to:-

- Understand the Shared Stock Unit Balance process.
- Make the declarations for a Shared Stock Unit.
- Produce a Balance Report.
- Rollover a Shared SU into the next Cash Account Period (CAP).



Shared SU Balance Process

Daily Summaries

Weekly Summaries

Non Accounting Data - Parcel Traffic

Declare Stamps

Declare Stock

Declare Cash

Check Declarations

Check Discrepancies

Produce the Balance Report

Roll Over into next BP/CAP



OBJECTIVES - Workbook 10

By the end of Section 2 - Individual Stock Unit, you will be able to:-

- Produce counter reports.
- Reverse a transaction from s report.
- Produce BES reports.
- Carry out the End of Day procedures on the Horizon system.
- Produce office reports.
- Make declarations for an individual Stock Unit.
- Produce a Balance Report.
- Rollover an individual SU into the next Cash Account Period (CAP).



Individual SU Balance Process

Daily Summaries

Weekly Summaries

Non Accounting Data/Parcel Traffic

Balance Snapshot

Declare Stamps

Adjust Stock

Declare Cash

Produce the Balance Report

Roll Over into next BP/CAP



Cash Account Process

Balance and Roll Over all active Stock Units

Roll Over any Inactive Stock Units

Produce the Office Balance Snapshot

Produce the Office Balance

Create Correction Stock Unit (if required)

Produce the Cash Account Snapshot

Produce the Trial Cash Account

Confirm Cash Account - Final Cash Account Produced



OBJECTIVES - Workbook 10

By the end of this workbook you will be able to:-

- Produce Daily Reports on the Horizon system.
- Complete the End of Day process on the Horizon system.



COURSE OBJECTIVES

By the end of the course you will:-

- Have an awareness of the Horizon system functions.
- Be able to navigate the system.
- Know and be able to use the support materials available.
- Have a level of comfort with the Horizon system, to enable you to carry out your everyday business transactions on return to your Post Office.

