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ICL Pathway **CSR+ OPERATING ENVIRONMENT: Processes and Procedures Description** Ref: CS/PRO/097

Commercial in Confidence Version: 3.0
Date: 13/12/00

0. Document Control

0.1 Document History

Version No.	Date	Reason for Issue	Associated CP/PinICL No.
0.1	20/08/99	Initial draft for ICL Pathway and Horizon review	Item transaction mode CCN473c System Busy CCN538a
0.2	01/10/99	Draft for ICL Pathway and Post Office Counters Ltd review	
0.3	19/11/99	Draft for ICL Pathway and Post Office Counters Ltd review	CCN557/CP2240 Change text of 'Complete' button on Produce Reports screen to 'Exit'. CCN557/CP2245 Print copy receipt by receipt key.
0.4	14/01/00	Draft for ICL Pathway and Post Office Counters Ltd review	CCN569/CP2243 withdrawn
1.0	17/01/00	Approved	
1.1	06/04/00	Draft for ICL Pathway and Post Office Counters Ltd review	CCN602a/CP2372 Create additional training data for CSR+ CCN614b/CP2432 LFS pick list ordering
1.2	04/05/00	Draft for ICL Pathway and Post Office Counters Ltd review	PinICL PC0034403 Input field behaviour. PinICL PC0034409 Key names on desktop buttons moved from bottom right to top left.
1.3	01/06/00	Draft for ICL Pathway and Post Office Counters Ltd review	

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1.4	13/07/00	Draft for ICL Pathway and Post Office Counters Ltd review	CP2635
1.5	15/08/00	Draft for ICL Pathway and Post Office Counters Ltd review	
2.0	12/09/00	Approved	CP2754
2.1	19/10/00	Draft for ICL Pathway and Post Office Counters Ltd review	CP2760 CP2517
2.2	05/12/00	Draft for ICL Pathway and Post Office Counters Ltd review	CP2841 PinICL 53564
3.0	13/12/00	Approved	

0.2 Approval Authorities

Name	Position	Signature	Date
Bob Booth	Operating Environment Product Manager, POCL Assurance, Horizon Programme		
Peter Jeram	Director of Development, ICL Pathway		

0.3 Associated Documents

Reference	Version	Title	Source
CS/DES/017		CSR+ Operating Environment PPD Design	ICL Pathway
CR/FSP/0004		Service Architecture Design Document	ICL Pathway
CS/IFS/005		Operational Level Agreement between Customer Service Reference Data Team and Pathway Development	ICL Pathway
CS/PRD/029		The Management Process for Operational Business Change - Outlet	ICL Pathway
CS/PRO/090		CSR+ Access Control and User Administration PPD	ICL Pathway

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CS/PRO/091		CSR+ Automated Payment Service PPD	ICL Pathway
CS/PRO/092		CSR+ Horizon System Helpdesk PPD	ICL Pathway
CS/PRO/093		CSR+ Introduction PPD	ICL Pathway
CS/PRO/094		CSR+ Order Book Control Service PPD	ICL Pathway
CS/PRO/095		CSR+ Electronic Point of Service PPD	ICL Pathway
CS/PRO/096		CSR+ Logistics Feeder Service PPD	ICL Pathway
PA/STR/013		ICL Pathway Core System Release Plus Contents Description	ICL Pathway
SD/DES/005		Horizon OPS Reports and Receipts – Pathway Horizon Office Platform Service	ICL Pathway
SD/DOC/009		Horizon OPS Desktop Messages and Help Text: CSR+	ICL Pathway
SD/SPE/016		Horizon OPS Menu Hierarchy: Release 2	ICL Pathway

Unless a specific version is referred to above, reference should be made to the current Approved version of documents.

0.4 Abbreviations/Definitions

Abbreviation	Definition
APS	Automated Payment Service
ATP	Authority To Pay
BT	British Telecommunications
CAP	Cash Account Period
CAPS	Customer Accounting and Payments Strategy
CMS	Card Management Service
CSR+	Core System Release Plus
EPOSS	Electronic Point of Sale Service
FAD	Financial Accounts Division
FPD	Flat Panel Display
HSH	Horizon System Helpdesk

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ICL	International Computers Limited
ISBN	Integrated Satellite Business Network
ISDN	Integrated Services Digital Network
LAN	Local Area Network
LED	Light Emitting Diode
LFS	Logistics Feeder Service
MBS	Message Broadcast Service
NBSC	Network Business Support Centre
NR2	New Release 2
NTE	Network Termination Equipment
OBCS	Order Book Control Service
OPS	Office Platform Service
OSD	On Screen Display
PAN	Primary Account Number
PES	Personal Earth Station
PIN	Personal Identity Number
PLU	Product Look Up
PMMC	Post Master's Memory Card
POCL	Post Office Counters Ltd
POLO	Post Office Logon
PPD	Processes and Procedures Description
PSTN	Public Service Telephone Network
RDMC	Reference Data Management Centre
SVR	Service Visit Report
WAN	Wide Area Network

0.5 Changes in this Version

Version	Changes
0.2	<p>Comments received on Version 0.1 incorporated.</p> <p>Item transaction mode now referred to as 'Products no longer available for sale (item transaction mode)'.</p> <p>Information on moveable outlets (equipment on trolley) included.</p> <p>Reporting faults - addition of information on calling the Horizon System Helpdesk to report potential safety risks.</p> <p>Appendix A updated to reflect changes to APS crash recovery.</p>
0.3	<p>CCN557/CP2240 Change text of 'Complete' button on Produce Reports screen to 'Exit'.</p> <p>CCN569/CP2243 Change screen keypad to QWERTY format.</p> <p>CCN557/CP2245 Print copy receipt by using Receipt key.</p>
0.4	<p>Comments received on Version 0.3 incorporated.</p> <p>CCN569/CP2243 Change screen keypad to QWERTY format withdrawn.</p> <p>CCN579/CP2314 POCL Regional Helpline renamed as Non Horizon Office Helpline approved.</p>
1.0	<p>Second author comments received on Version 0.4 incorporated (Distribution section- John Opara replaced by Brendan Nugent; Associated documents section version numbers updated; Section 4.9.2.3 Horizon System helpdesk changed to Horizon System Helpdesk; Section 5.7.1 Message ref changed to 'Message: EPOSS:MSG195; Section 7.5 Message document's title corrected; Section 7.6 Reports and Receipts document's title corrected; Appendix A words 'session disaster' un-emboldened.)</p>
1.1	<p>CCN602Aa/CP2372 Create additional training data for CSR+.</p> <p>CCN614B/CP2432 LFS pick list ordering.</p> <p>Section 7.3 'The Edit function' updated with latest screen shots.</p>
1.2	<p>Comments received on Version 1.1 incorporated.</p> <p>PinICL PC0034403 Input field behaviour.</p> <p>PinICL PC0034409 Key names on desktop buttons moved from bottom right to top left.</p>

Version	Changes
1.3	Comments received on Version 1.2 incorporated. New screens/extra information added to Section 7.7 Memo View and its subsections. Use of keyboard PLU key – extra emphasis added.
1.4	Comments received on Version 1.3 incorporated. CP2635 Input field behaviour (bleeping/purple halo) key names moved to top right of buttons. <u>Document only changes (e.g arising from the Horizon System User Guide review) (CP2754) - see below.</u>

Section 2 Scope:

The Finish icon added to topics covered under Horizon software.

Section 5 The Horizon software (part 1):

The Finish icon added to topics covered under Horizon software.

New *Section 5.6 The Finish icon* and subsections *5.6.1 Finish icon displaying 'TAKE'* and *5.6.2 Finish icon displaying 'PAY'*:

Added to illustrate the Finish icon showing 'TAKE' and 'PAY'.

Sections 5.11.2 Entering data into an input field and *5.11.3 Deleting data from an input field*:

Addition of word 'when'.

Section 5.12.1.2 Navigation buttons:

Word 'Prev' added when referring to Previous button.

Section 6.2.1 Using Shopping mode:

Shopping mode, Shop, Accept and One More options now referred to as buttons.

Sections 6.3.1 The PLU No function and *6.3.2 The PLU List function*:

PLU List button now referred to as an option.

Section 7.7.1 The Memo View screen:

Added that when user selects a message the system highlights the selected message in the picklist. When user selects Next option, next set of messages is displayed; when user selects Previous option, previous set of messages is displayed. Message text displayed in message panel area of screen is that of currently selected message. This does not change when user moves up and down the message selection pick list - only changes when user selects another message from the pick list.

Section 7.8 Training mode overview: extra information added on the training database reset (occurs overnight during Desktop reload).

Version	Changes
1.5	CCN630 Changes to Powerhelp call references. <u>Document only changes (e.g arising from the Horizon System User Guide review) (CP2754) – see below.</u>

Reviewed By section on front page changed to match ACUA PPD. Bob Booth document champion. Alison Peacock's name added to list of ICL Pathway reviewers.

0.2 Approval Authorities:

Position column for Bob Booth edited.

Section 2 Scope:

List of topics covered under Horizon hardware sections added to this section.

Horizon System Helpdesk call reference paragraph updated to reflect new call types (Call Type:Problem).

Section 4.3.5.1 Magnetic card reader's lights:

Section removed. Information moved to a new Section - *Section 4.3.6.1 Magnetic card reader and smart card reader/encoder's lights.*

Section 4.3.6.1 Inserting a card into the smart card reader:

Section now part of Section 4.3.6 Smart card reader/encoder.

Section 4.3.6.2 Smart card reader/encoder's lights:

Section removed. Information moved to a new Section 4.3.6.1 Magnetic card reader and smart card reader/encoder's lights.

Section 4.5 Processor:

Removal of reference to switching off processor to perform certain POLO operations. Section now states that the processor must not be switched off at any time (unless moving a trolley, in an emergency or under instruction from Horizon System Helpdesk). Processor will need to be restarted if user needs to perform the lost PIN/PMMC, change PIN or PMMC security data update procedures. If processor is switched off by accident, outlet manager must follow procedure to regain access to a switched-off or restarted workstation. (Cross-refs to ACUA PPD).

Section 4.10.1 Locations of equipment on the trolley:

'PC' callout text changed to 'Processor'.

Section 5.5 Hourglass 'System Busy' indicator:

Paragraph added: ' During this period, the rotating hourglass may disappear and then re-appear. This does not indicate that the system activity has been completed.

When the system activity has been completed, the rotating hourglass will disappear and the dialogue on the screen will change.'

Section 5.11.3 Deleting data from an input field:

Typo corrected - 'deleting data into an input field' changed to 'deleting data from an input field'

Section 6.1.1 Using the Quantity function:

Step 4 - Missing word 'a' inserted.

Section 6.1.2 Selecting a quantity via the keyboard:

Added that the system displays the quantity that the user has entered on the Quantity button (see *Section 6.1 The Quantity function*). If the user has entered an incorrect quantity, they must wait for two seconds and then re-enter the quantity correctly.

Section 7.1.1.1 Voiding a transaction description:

Following paragraph added: 'Some transactions are defined in reference data as being non-voidable. If the user needs to cancel a transaction of this type, they must complete the transaction as normal and then reverse it.'

Section 7.1.1.2 Voiding a transaction procedure:

Step 2 Exception A removed.

Step 3 added with Scenarios A and B for if transaction has been voided/ has not been voided.

Section 7.4 Suspend and Swap:

Following words added:

'The Suspend function is available for all sessions such as transfers and remittances as well as for the Serve Customer menu options.

The user cannot suspend a session during balancing, editable pick list selection, reports production or during an AP smart card transaction. While two sessions are in progress, the user may not log out, start balancing, start Cash Account production or start AP recovery procedures. Whenever an activity is taking place that cannot be suspended, the Susp button displays a no entry sign (see *Section 5.3 No entry signs*).'

Section 7.4.2.1 Suspending and resuming a session procedure:

New section added.

Sections 7.6.1.4 Adding a report to the print queue and Section 7.6.1.5 Clearing the print queue:

Changed to become level 5 headings as they are subsets of MSG534 described in *Section 7.6.1.3 Printer Busy message*.

Section 7.7.1 The Memo View screen:

Note added to this section saying that the memo at the top of the list is automatically displayed and therefore marked as 'read'.

Final sentence in penultimate para changed to read 'When the user selects the Previous option, the previous set of messages is displayed.'

Section 7.8 Training Mode overview:

Penultimate paragraph reworded - 'If the Desktop reload does not take place, the user has the option of resetting it the next time that training mode is accessed.'

Section 8 Equipment maintenance:

Sentence added stating that Horizon equipment installed in an outlet should not be moved or relocated by outlet staff.

Section 8.1 Processor:

Now states that processor must not be switched off (unless it needs to be switched off and restarted under instruction from the Horizon System Helpdesk, in an emergency, or switched off before moving a trolley) Cross-reference to ACUA PPD.

Section 12.3.3. Security breach or equipment stolen:

'Post Office' changed to 'post office'.

Version	Changes
2.0	Document only changes (e.g arising from the Horizon System User Guide review) (CP2754) – see below.

Section 3.1.1 Daily desktop reload – reworded as follows:

'There is a daily desktop reload which is necessary to reconfigure applications and also to reconfigure the Training Service. To ensure minimum service disruption, the reload will be scheduled to occur when no user is logged on at a counter during the period between 03:00 hours and 04:00 hours. If a user has been logged on since 03:00 hours, an advisory prompt will be output asking the user to log out to enable the reload to take place [Message Hard messages Access control and user administration: 3 am system reload]. The prompt occurs between 03:00 hours and 03:30 hours approximately. Should the user not log out before 03:30 hours then the overnight reload will not take place for that counter. Such occurrences will be monitored.'

If the desktop is not reloaded, ICL Pathway reference data updates may be affected. Product reference data changes are not affected as they are picked up whether the desktop is reloaded or not.'

In the event of a LAN failure, the delivery of reference data is not affected so long as one counter at the outlet (usually this will be the Gateway workstation) has received the data. When the other counters become reconnected to the LAN, they have their reference data updated from the Gateway.'

Section 12.1 Handling office closures

Medium term closure bullet point changed to read:

- Medium term closure (also known as a planned temporary closure).
(Reference to an alternative card-enabled office being named deleted).

Long term closure bullet point changed to read:

- Long term closure (POCL planned permanent closure): a planned long-term/permanent closure.'

Section 12.3.2 Emergency closure – reference to HSHD call [Call Change: post office emergency closure].

Section 12.3.4 Office environment failures – third paragraph, first two sentences reworded as follows:

'If the environmental failure is due to a unit (for example, a printer), a call must be made to the Horizon System Helpdesk [Call Hardware: as appropriate]. If the source of the environmental failure is general (for example, failure of the power feed to the sockets in the outlet), a call must be made to the Horizon System Helpdesk [Call Environmental: as appropriate].'

Section 12.4.1 An outlet is to be closed on a temporary basis - reference to HSHD call [Call Change: post office temporary closure].

Section 12.4.2 Reopening a temporarily closed outlet - reference to HSHD call [Call Change: post office planned reopening].

Version	Changes
2.1	CP2517/CCN633b Introduction of satellite connected post office outlets. Following sections amended/added: <i>Section 0.4 Abbreviations/Definitions</i> – ISBN and PES added. <i>New Section 11.2.1.6 Satellite connected outlets</i> added. <i>New Section 11.2.1.6.1 The PES unit</i> added. Subsequent sections re-numbered. CP2760/CCN706 EPOSS desktop – Printing Receipt tablet. New final paragraph added to <i>Section 7.4.3 Receipt and Reprint Receipt function</i> . <u>Document only changes – (CP2852) see below.</u>

Reviewed By section on front page – Dave Tanner's name added to list of reviewers.

Version	Changes
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2.2	<p><i>Section 0.3 Associated documents:</i> Removal of version numbers from document references and addition of 'Unless a specific version is referred to above, reference should be made to the current Approved version of documents.'</p> <p>PinICL 53564 (references to MSGs 317 and 319) added to <i>Section 7.9.4 Lack of full node availability</i>.</p> <p>CP 2841 Definition of MBS in OE PPD. Following sections updated/amended:</p> <p><i>Section 0.4 Abbreviations/definitions:</i> MBS and RDMC added.</p> <p><i>Section 7.7 Memo View</i> and its subsections rewritten to incorporate information from POCL workshop.</p> <p><u>Document only changes - (CP2852) see below.</u></p>
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Reviewed By section on front page – Dean Felix replaced by Doug Jones; Philip Hemingway replaced by Walter Wright.

Section 0.2 Approval Authorities - Peter Jeram replaces Terry Austin.

Sections 11.2.1.5 and 11.2.1.6 renumbered. *Section 11.2.1.5* becomes *Outlets without ISDN connection*. *Section 11.2.1.5.1* becomes *Frame Relay*. *Section 11.2.1.5.2* becomes *Satellite connected outlets*.

Section 11.2.1.5.3 The PES unit - reference to HSHD call reference ND10 Satellite (PES) added.

Version	Changes
3.0	None

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0.6 Changes Expected

Changes
Change of first line support from HSH to NBSC (CRP0111).
Introduction of mobile configurations (CCN632/CP2512). M1
Memoview message within outlet when any counter is disconnected (CP2797).
Allow 'Clerk' access to calibration (Adjust Screen) on Engineer menu (CP2838).
Allow Clerk/Supervisor access to Desktop function to test peripherals (CP2839).
PinICL52000 MSG613 replaces MSG222 at M1.

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1 Purpose

This document describes the processes and procedures required to successfully operate the Horizon System hardware and software at post office counters in accordance with the ICL Pathway Core System Release Plus (CSR+).

This PPD provides a description of the processes involved in order to enable the contractual agreement of procedures and to be a source from which the authors can develop the further user documentation needed.

2 Scope

This PPD describes the following processes and procedures:

- Using the Horizon hardware:
 - Monitor (including touch-screen)
 - Keyboard (including magnetic and smart card reader/encoder)
 - Bar-code reader
 - Processor
 - Counter printer
 - Office printers (inkjet and laser)
 - Moveable outlets (trolleys)

Note: the electronic scales are non-ICL equipment. Therefore no guidelines for their use or maintenance are included in this PPD.

- Using the Horizon software:

-
- Keyboard equivalents
 - Selecting functions via ALT + underlined character
 - No entry and padlock signs
 - Hourglass 'System Busy' indicator
 - The Finish icon
 - Screen estates
 - Menu selection
 - Products no longer available for sale
 - Horizon system screen types
 - Data entry facilities
 - Navigation
 - The Quantity function
 - Shopping mode
 - Product Look Up (PLU) functions
 - The Bin function
 - The Info function
 - The Edit function
 - Suspend and Swap
 - Reports and receipts
 - Memo View
 - Training mode
 - Maintaining the Horizon hardware
 - Installing consumables
 - Ordering consumables
 - Reporting faults (hardware and software)
 - Contacting the Horizon System Helpdesk
 - Reporting changes to the office environment
 - Order of recovering transaction data following a system failure (Appendix A)

This PPD is one of a set of PPDs provided for CSR+. The way in which the set fits together is described in the CSR+ Introduction PPD [Ref. CS/PRO/093].

Access to menus in the hierarchy depends upon the user's role. Users' access rights to functions and procedures are described in the Horizon OPS Menu Hierarchy: Release 2 [Ref. SD/SPE/016].

The screen messages described in this PPD are summarised and suffixed with a cross-reference in the form: '[Message *Collection:ObjectName*]' where *Collection* is the Collection name and *ObjectName* is the ObjectName within this collection (or for hard-coded messages, the context and caption of the message). These relate to an entry in Horizon OPS Desktop Messages and Help Text: CSR+[Ref. SD/DOC/009] that defines the text of the message.

The Horizon System Helpdesk calls described in this PPD are cross-referenced to the calls described in the CSR+ Horizon System Helpdesk PPD [Ref. CS/PRO/092] as follows: 'Telephone the Horizon System Helpdesk [Call *Type:Problem*]' where *Type* is the call type and *Problem* is the problem within this type, for example Hardware:counter printer fault. (Note that these cross-references are provided solely to assist PPD reviewers; the call references are not relevant to the helpdesk callers.)

3 Overview

The CSR+ operating environment consists of the following components:

- Counter system environment described in *Section 3.1*.
- Office hardware described in *Section 4*.
- The Horizon software described in *Sections 5, 6 and 7*.

3.1 Counter system environment

The counter system environment constitutes an office software suite of applications comprising:

- Order Book Control Service (OBCS) - a facility for checking bar-coded order books against a national system stop list.
- Automated Payment Service (APS) - support for utility companies and others who provide payment mechanisms based on cards and other tokens.
- Electronic Point of Sale Service (EPOSS) - support for customers purchasing all other goods or services available from POCL as well as accounting, reporting and administration functions.
- The Logistics Feeder Service (LFS) which works in conjunction with the SAP Advanced Distribution System (SAPADS) to create a replenishment and return service for cash, value and non-value stock.

A PPD document has been produced for each of the above services. Please refer to the *Section 0.3 Associated documents* for the reference numbers of these documents.

3.1.1 Daily desktop reload

There is a daily desktop reload which is necessary to reconfigure applications and also to reconfigure the Training Service. To ensure minimum service disruption, the reload will be scheduled to occur when no user is logged on at a counter during the period between 03:00 hours and 04:00 hours. If a user has been logged on since 03:00 hours, an advisory prompt will be output asking the user to log out to enable the reload to take place [Message Hard messages Access control and user administration: 3 am system reload]. The prompt occurs between 03:00 hours and 03:30 hours approximately. Should the user not log out before 03:30 hours, then the overnight reload will not take place for that counter. Such occurrences will be monitored.

If the desktop is not reloaded, ICL Pathway reference data updates may be affected. Product reference data changes are not affected as they are picked up whether the desktop is reloaded or not.

In the event of a LAN failure, the delivery of reference data is not affected so long as one counter at the outlet (usually this will be the Gateway workstation) has received the data. When the other counters become reconnected to the LAN, they have their reference data updated from the Gateway.

4 The Horizon hardware

This section describes the Horizon hardware. For information on maintaining the Horizon equipment, see *Section 8, Equipment maintenance*. For information on installing consumables, see *Section 9, Installing consumables*. For information on reporting faults, see *Section 11, Reporting faults*.

Outlet staff are required to use the Horizon equipment as supplied and no attempt should be made to modify or replace it.

The hardware consists of the following components:

- Monitor (including touch-screen)
- Keyboard (including magnetic and smart card reader/encoder)
- Bar-code reader
- Processor
- Counter printer
- Office printer (either inkjet or laser)

4.1 What is a node?

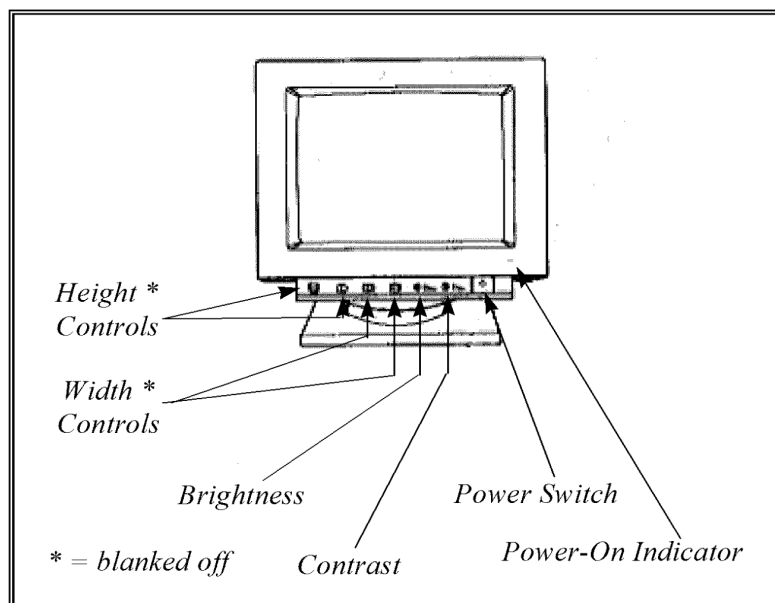
A node is the term used for the set of Horizon equipment used at a counter position - the PC and its associated peripherals. A node is sometimes referred to as a counter position.

4.2.1 Switching the monitor on and off

The monitor should normally be switched on at the beginning of the day and switched off at the end of the day. If the system is not being used for a period of an hour or more, the monitor can be switched off and then switched on when the system is to be used again.

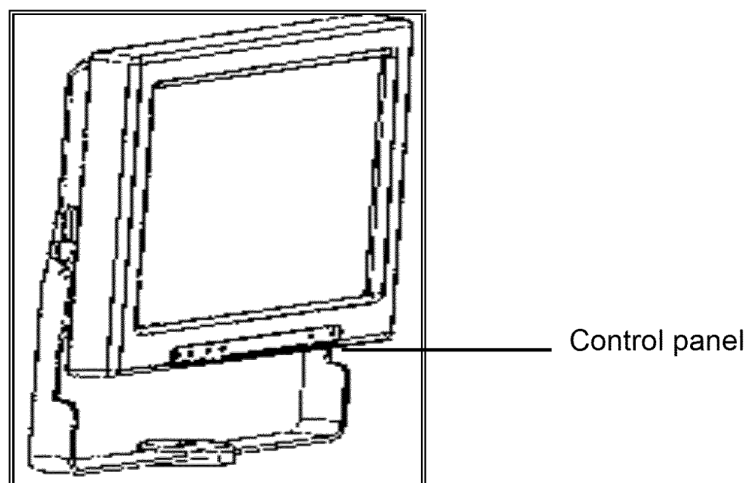
4.2.2 MicroTouch monitor

MicroTouch monitors are used in branch offices.

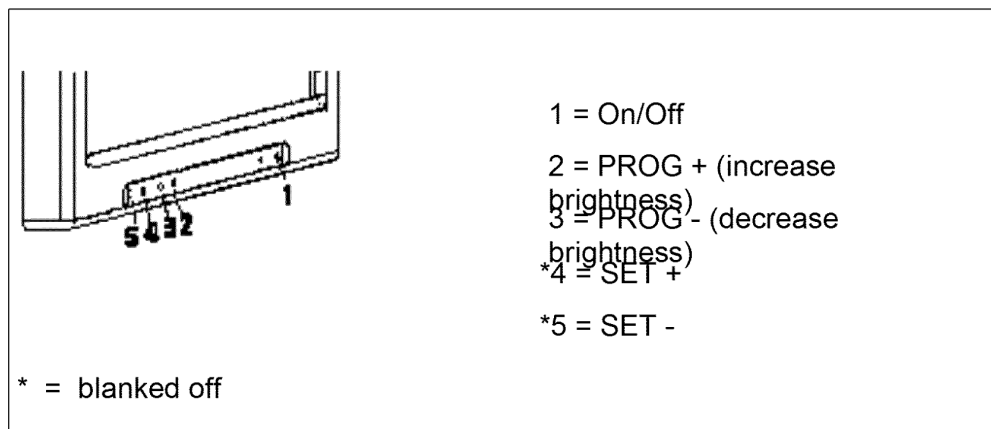


4.2.3 Flat Panel Display monitor

FPD monitors will be installed in all offices except branch offices which will have MicroTouch 10" monitors only.



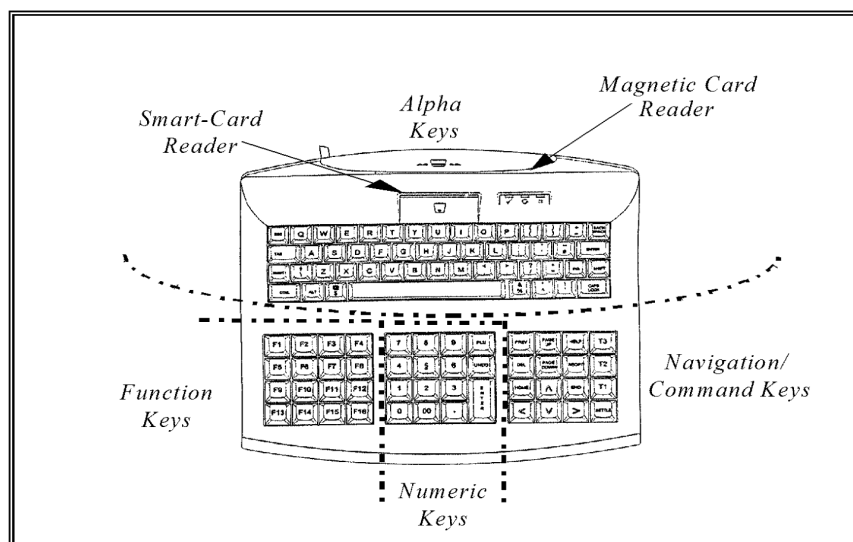
4.2.3.1 FPD control panel buttons



4.3 Keyboard (including magnetic and smart card reader/encoder)

The keyboard may be used as an alternative method of selecting functions or entering data. It is made up of sections of keys as shown in the illustration below. Incorporated within the keyboard are a magnetic card reader and a smart card reader/encoder.

The diagram below shows the overall layout of the keyboard and the areas in which the different sets of keys lie. Each component is described in further detail in the following sub-sections.



4.3.1 Alpha keys

The Alpha keys area of the keyboard is similar (but not identical) to the conventional QWERTY layout. The alpha keys are used as an alternative to

the alphanumeric keypad display for field entry. The key layout is as follows:

ESC	!	"	£	\$	%	^	&	€	()	-	+	*	BACK SPACE
	Q	W	E	R	T	Y	U	I	O	P	-	=		
TAB	A	S	D	F	G	H	J	K	L	:	@	~	ENTER	
SHIFT		Z	X	C	V	B	N	M	<	>	?	{	}	SHIFT
CTRL	ALT	⌂									+	ALT	CTRL	CAPS LOCK

4.3.2 Function keys

The Function keys are keys that perform functions pre-programmed by the Horizon System. The function performed by each key depends upon the context in which it is used. The key layout is as follows:

F1	F2	F3	F4
F5	F6	F7	F8
F9	F10	F11	F12
F13	F14	F15	F16

4.3.3 Numeric keys

The Numeric keys are similar to the standard typing numeric keys. They are used for entering numeric data as an alternative to the alphanumeric keypad screen displays. The key layout is as follows:

7	8	9	PLU
4	5	6	RECPT
1	2	3	ENTER
.	0	00	✓

For a definition of the numeric key mapping to screen buttons, see Appendix A in the Horizon Office Platform Service Style Guide [Ref. SD/STD/001].

4.3.4 Navigation/Command keys

The Navigation or Command keys perform specific commands on the Horizon System. For example, the user can return to the Desktop menu by either touching the Desktop button on the screen or pressing the Home key. The key layout is as follows:

PREV	PAGE UP	HELP	T3
DEL	PAGE DOWN	UNDO	T2
HOME	↑	MORE	T1
←	↓	→	END

For a definition of the way in which screen buttons and navigation/command keys map on to each other, see Appendix A in the Horizon Office Platform Service Style Guide [Ref. SD/STD/001].

4.3.5 Magnetic card reader

The magnetic card reader allows the system to read the information stored in the magnetic strip of a swipe card. This information is used to support various customer transactions.

To swipe a magnetic card:

Step 1. Pick up card.

Step 2. Ensure magnetic strip is facing you and on the bottom of the card.

Step 3. Place card in either left or right hand side of magnetic card reader slot ensuring it rests firmly on the bottom of the slot.

Step 4. Pull the card from left to right, or right to left, through the slot.

4.3.6 Smart card reader/encoder

The smart card reader/encoder allows smart card information to be processed by the system to support various AP transactions (see the CSR+ APS PPD [Ref. CS/PRO/091]).

The smart card reader also accesses the Post Masters' Memory Cards (PMMCs) which are supplied with the system and are used for Post Office Logon (POLO) start up procedures (see the CSR+Access Control and User Administration PPD [Ref. CS/PRO/090]).

To insert a card into the smart card reader:

Step 1. Pick up card.

Step 2. Ensure that the gold contact pad is facing you.

Step 3. Insert card gently but firmly into the smart card reader until it touches the bottom of the slot.

4.3.6.1 Magnetic card reader and smart card reader/encoder's lights

The magnetic card reader's lights indicate the following:

- Orange: reading
- Red: read of a correctly positioned valid card unsuccessful
- Green: read successful

In general, three attempts should be made to scan the magnetic card and then, if the card still has not been read successfully, the user should enter the information manually by keying in the appropriate details from the front of the card.

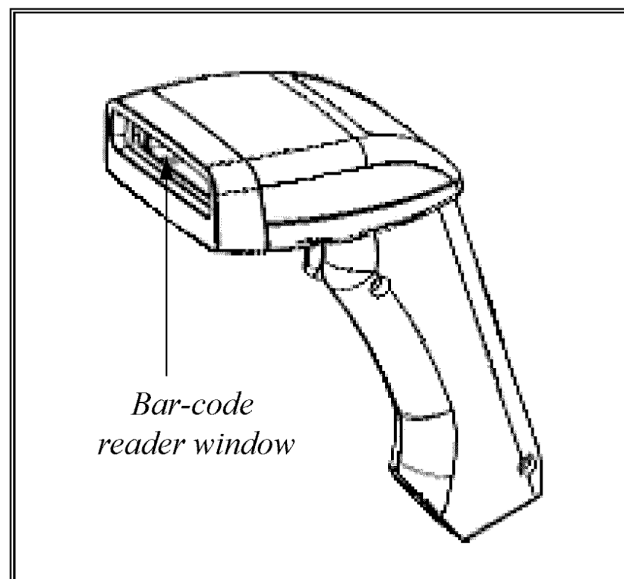
When a smart card is inserted in the smart card reader, the reader light changes to orange to indicate that the card is being read.

If the reader light changes to red, there is a fault in the reader or smart card. A call should be made to the Horizon System Helpdesk [Call Hardware:Smart card reader fault]

4.4 Bar-code reader

The bar-code reader is hand-held and is used to read bar-coded characters.

Note: the bar-code reader should not, under any circumstances, be pointed at anyone's eyes.



4.4.1 Scanning a bar-code

To scan a bar-code:

Step 1. Ensure bar-code is facing upward.

Step 2. Place bar-code reader over bar-code at distance of approximately 3 inches or 7 centimetres.

Step 3. Pull trigger on bar-code reader.

Step 4. The bar-code reader will beep if the scan is successful. If it does not beep, the scan is unsuccessful.

Note: in general, you should make three attempts to scan the bar-code and then, if the bar-code has still not been read successfully, enter the bar-code manually by keying in the numbers shown under the bars.

4.5 Processor

The processor device's function is to run the Application Suite of software and process information. It has a Power-On indicator light and an On/Off switch.

The single-counter processors used for CSR+ have a fixed hard drive and a removable hard drive. The removable hard drive is found in the middle of the front of the processor, and looks like a slightly larger than normal floppy disk drive, but also has a lock. The user is not required to remove the drive at any time and therefore the key to the lock is not delivered with the equipment.

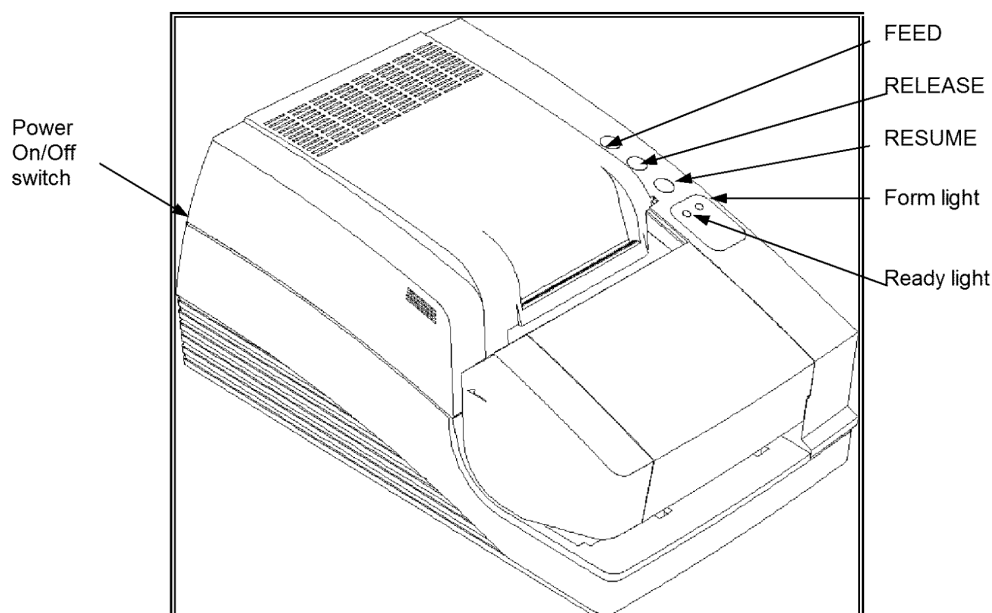
The multi-counter processors used for CSR+ have a fixed hard drive only.

Notes:

- The processor must not be switched off at any time, unless moving a trolley, in an emergency or if the user is instructed to switch it off by the Horizon System Helpdesk. Shutting down a processor is described in the CSR+ Access Control and User Administration PPD [Ref. CS/PRO/090]
- The processor will need to be restarted if the user needs to perform the lost PIN/PMMC, change PIN or PMMC security data update procedures. Shutting down and restarting a processor is described in the CSR+ Access Control and User Administration PPD [Ref. CS/PRO/090].
- If the processor is switched off by accident, the outlet manager must follow the procedure to regain access to a switched-off or restarted workstation. Regaining access to a switched-off workstation is described in the CSR+ Access Control and User Administration PPD [Ref. CS/PRO/090].

4.6 Counter printer

The counter printer will allow the printing of receipts for transactions and some reports. Receipts will be produced automatically for some transactions, and at the request of the user for others.



The counter printer has three buttons, a FEED button, RELEASE button and a RESUME button.

The printer has two indicator lights, a Form light and a Ready light.

4.6.1 Counter printer's lights

Light	State
Form	<ul style="list-style-type: none">• Lit continuously if the paper roll is low or has run out.• Flashes if a receipt has not been inserted for a payment. (For example, if the receipt slip has not been inserted correctly or soon enough.)
Ready	<ul style="list-style-type: none">• Lit when printer is ready to print.• Flashes orange and green when paper roll is low.

For information on replacing the paper roll and changing the printer's print ribbon cassette, see *Section 9.1.1 Counter printer consumables*.

4.6.2 Counter printer's buttons

Button	Use to
--------	--------

FEED	Feed paper through the printer.
RELEASE	Clear or release the paper or slip if a paper jam occurs.
RESUME	Remove unused paper from the printer - press the FEED and RESUME buttons at the same time.

4.6.3 Switching the counter printer on and off

The Power On/Off switch is located at the rear of the printer. The Ready light is lit when the printer is ready to print.

The counter printer should normally be switched on at the beginning of the day and switched off again at the end of the day. If the system is not being used for a period of one hour or more, the counter printer can be switched off and then switched on again when it is next required.

4.6.4 Inserting a slip into the counter printer

To insert a slip into the printer:

Step 1. Orientate slip face up with top furthest away from you.

Step 2. Insert slip into bottom slot of counter printer to the far right of the aperture- push forward until resistance is felt.

Step 3. Grip slip at bottom ensuring that both sheets are gripped and taut.

4.6.5 Removing a receipt from the counter printer

Care should be taken when removing a receipt from the printer. The user should give the printer time to finish printing the receipt and take care not to pull the receipt out too quickly. If the receipt is pulled out too quickly, it is possible that not all the printed details will appear on the receipt.

4.6.6 Action to take if the tally roll paper becomes torn while a receipt is being printed

If the tally roll paper tears and the paper is not feeding through while a receipt is being printed, printing continues. The Horizon software cannot detect the fact that the paper is not feeding through correctly.

If this occurs, the user must remove the torn section of paper or install a new tally roll as described in *Section 9.1.1 Counter printer consumables* and reprint the receipt using the Reprint Receipt function as described in *Section 7.4.3 Receipt and Reprint Receipt function*.

4.6.7 Action to take if a receipt is printed when the print ribbon cassette has been removed from the counter printer

If the print ribbon cassette is removed from the counter printer, the printer continues to function. The Horizon software cannot detect the fact that the printer does not have a print ribbon cassette loaded.

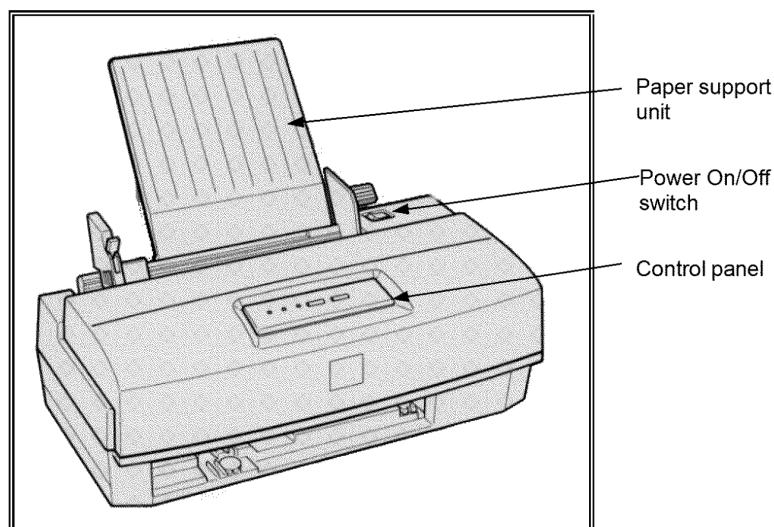
If this occurs, the user must install a print ribbon cassette as described in *Section 9.1.1 Counter printer consumables* and reprint the receipt using the Reprint Receipt function as described in *Section 7.4.3 Receipt and Reprint Receipt function*.

4.6.8 Action to take if printer paper jams when printing a multi-page slip receipt

If the printer paper jams when printing a multi-page slip receipt, the user should switch the printer off then on again. They should then press the RELEASE button to allow the receipt printing to continue.

4.7 Inkjet printer

The inkjet printer is used to print reports, such as client summaries, cash accounts and a variety of system-generated reports. The reports can vary in regularity, between daily and weekly.



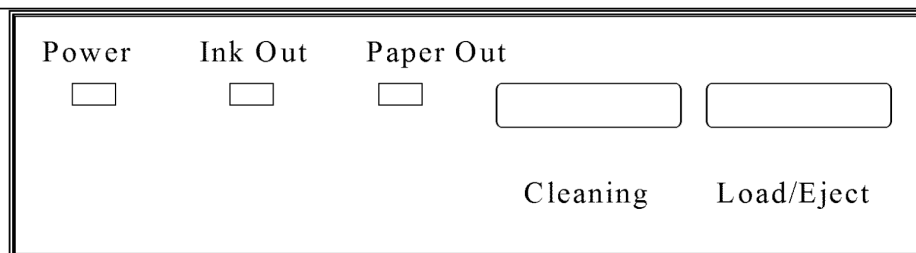
4.7.1 Switching the inkjet printer on and off

The power On/Off switch is located on the right-hand side of the paper support unit. The Power light is lit when the printer is ready to print.

The inkjet printer should be switched on when reports are to be printed and switched off again once the reports have been printed. (This allows power savings to be made and has no impact on customer transactions as other tasks can be performed while the printer is warming up.)

4.7.2 Inkjet printer's control panel

The lights and buttons on the control panel illustrated below, give control over most common printer operations.



4.7.3 Inkjet printer's lights

Light	State
Power	<ul style="list-style-type: none">• Lit when printer is turned on.• Flashes while the ink cartridge or print head unit is being replaced or while the print head is being cleaned.

Light	State
Ink Out	<ul style="list-style-type: none">• Lit when the ink cartridge is empty or not installed. (Printer will not work when the ink cartridge is empty or not installed.)• Flashes when the ink is low.
Paper Out	<ul style="list-style-type: none">• Lit when the printer runs out of paper.• Flashes when a paper jam occurs.

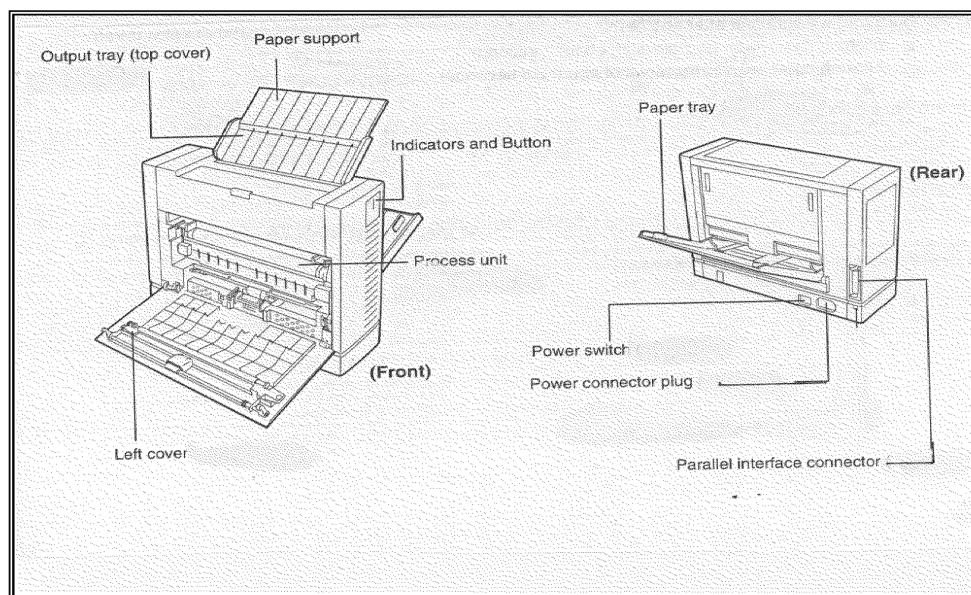
4.7.4 Inkjet printer's buttons

Button	Use to
Cleaning	<ul style="list-style-type: none">• Start the print head cleaning cycle. (See <i>Section 8 Equipment maintenance</i>.)
Load/Eject	<ul style="list-style-type: none">• Load or eject a sheet of paper.• Move the print head unit left to the cartridge replacement position.• Return the print head to the home position (far right) once the cartridge has been replaced.

See *Section 9.1.2. Inkjet printer consumables* for information on loading paper and replacing the printer's inkjet cartridge.

4.8 Panasonic laser printer

The laser printer is used for the same reasons as the inkjet printer. Only the larger multi-counter post offices will have a laser printer.



4.8.1 Switching the Panasonic printer on and off

The power On/Off switch is located beneath the paper tray and to the left of the power connector plug (as shown in the diagram above). The READY indicator light is lit when the printer is ready to print.

The printer should be switched on when reports are to be printed and switched off again once the reports have been printed. (This allows power savings to be made and has no impact on customer transactions as other tasks can be performed while the printer is warming up.)

4.8.2 Panasonic printer's indicator lights and button

The printer's indicator lights and button are located at the top right hand side of the printer.

4.8.2.1 Panasonic printer's indicator lights

Light	State
ERROR	<ul style="list-style-type: none">• Blinking fast (other indicator lights unlit) indicates that the paper tray is empty.• Blinking fast and TONER/PROCESS UNIT light lit, indicates that the Process Unit is not installed.
READY	<ul style="list-style-type: none">• Lit when the printer is ready to print.
TONER/PROCESS UNIT	<ul style="list-style-type: none">• Lit and the ERROR light is blinking fast, indicates that the Process Unit is not installed.• Blinking slowly indicates that the toner may be empty.• Blinking fast indicates that the toner may be empty and the life cycle of the Process Unit may have expired.

See *Section 9.1.3 Panasonic laser printer consumables* for information on installing/replacing the printer's Process Unit and adding toner to the Process Unit.

4.8.2.2 Panasonic printer's PRINT/RESET button

The PRINT/RESET button will execute one of the following functions depending upon the status of the printer:

- If the READY indicator light is on, press the PRINT/RESET button for about 5 seconds to print a test page. You can then reset the printer by pressing this button until the three indicator lights are lit.
- If the READY indicator light is blinking slowly, press the PRINT/RESET button for about 5 seconds to print the remaining data. You can then reset the printer by pressing this button until the three indicator lights are lit.

4.8.3 Action to take if the Panasonic printer runs out of paper while printing a report

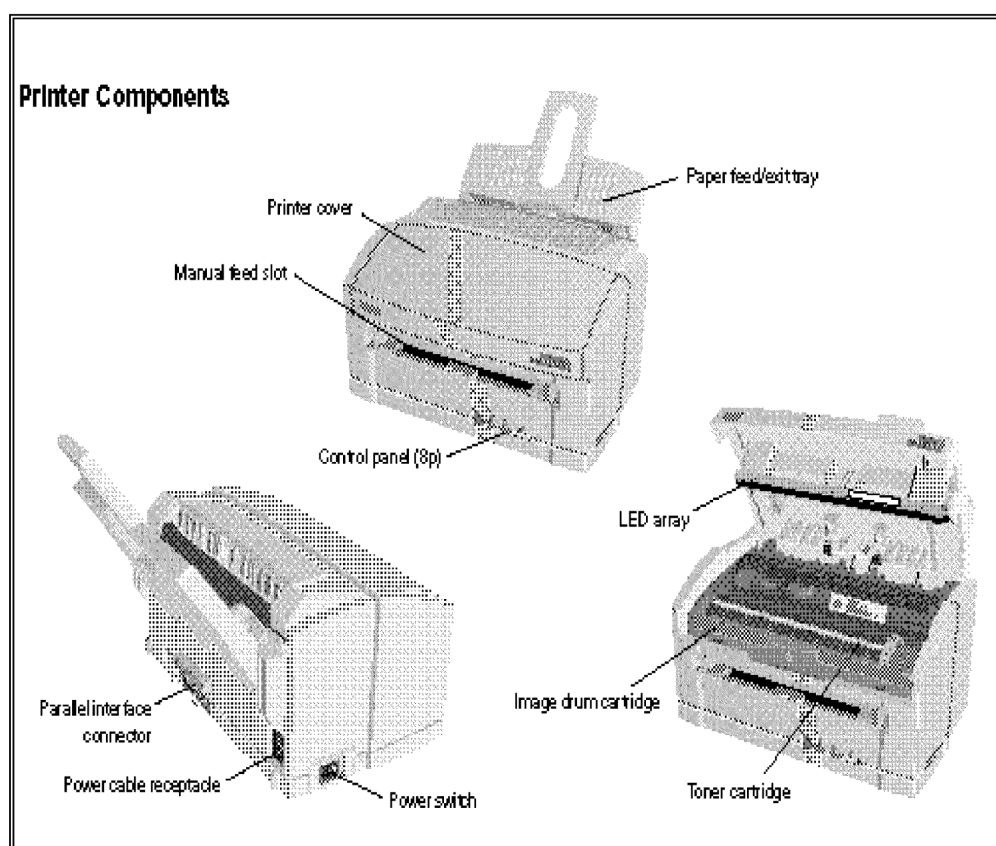
If the printer tries to print a page and detects that there is no paper, printing ceases and the printer's red error LED flashes. The system becomes aware of the problem with the printer and displays the printer error screen asking the user to check the printer and then giving retry print and cancel print options [Message EPOSS:MSG180].

The user should add more paper and then press the PRINT/RESET button on the front of the printer briefly (less than 5 seconds). This causes the printer to resume printing after a short delay. If the user presses the PRINT/RESET button on the front of the printer for more than 5 seconds the printer is reset and the report being printed will contain garbled text. For this reason, if a Panasonic laser printer is reset while a report is being run, the current report

should either be cancelled using the Cancel option or, if that option is not available, the report should be left to run its course and then reprinted. For the final Cash Account, an opportunity is given to reprint the report after it has been previewed.

4.9 Okipage laser printer

The Okipage laser printer is the replacement for the Panasonic laser printer which will eventually be withdrawn from service. The diagrams below show the printer's component parts.



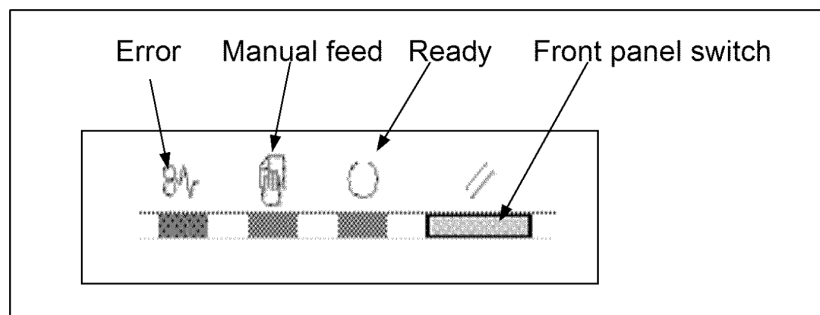
4.9.1 Switching the Okipage printer on and off

The printer's power on/off switch is located towards the rear of the left-hand side of the printer (as shown in the diagram above).

The printer should be switched on when reports are to be printed and switched off again once the reports have been printed. (This allows power savings to be made and has no impact on customer transactions as other tasks can be performed while the printer is warming up.)

4.9.2 Okipage printer's control panel

The printer's control panel is located on the front right hand side of the printer. The control panel contains three Light Emitting Diodes (LEDs) indicating Error, Manual feed and Ready states for the printer. There is also a front panel switch.



4.9.2.1 Okipage printer's control panel LEDs

Each of the control panel LEDs can be in any one of five states:

○ On

● Off

▲ **Blinking (slowly)** repeats ON (2 seconds)/OFF (2 Seconds)

★ **Blinking** repeats ON (500ms)/OFF (500ms)

✱ **Blinking (quickly)** repeats ON(120ms)/OFF(120ms)

4.9.2.2 Okipage printer's front panel switch

The front panel switch has different functions depending on the condition of the front panel LEDs and also on the length of time that the button is pressed. There are three different modes of operation:

- 0 Button pressed and released immediately
- 2 Button pressed for more than 2 seconds (but less than 5 seconds)
- 5 Button pressed for more than 5 seconds

4.9.2.3 Okipage printer's LED indications

The following table shows how the user can diagnose common printer conditions by checking the state of the LEDs.

(Please see *Sections 4.9.2.1 Okipage printer's control panel LEDs* and *4.9.2.2 Okipage printer's front panel switch* for an explanation of the symbols used in this table.)

Printer state	Error LED	Manual feed LED	Ready LED	Recovery action
Ready	●	●	○	-
Cancelling data process	●	●	▲	Buffer contents - 2 cleared 5 printed
Receiving, processing or printing data	●	●	★	-
Manual request	●	★	●	-
Change drum, toner low or toner sensor warning	▲	-	-	-
Buffer overflow or Print overrun	★	●	●	Recover - 0
Paper out or input jam	★	●	●	Recover and print restart - 0
Paper jam (size check, feed jam, exit jam)	★	●	●	Print restart by opening and closing printer's cover
Error - printer cover open	★	●	●	-
Program error	★	★	★	Recover by switching the printer off then on again
Hardware error	⊗	⊗	⊗	Try switching the printer off then on again. Make a service call to the Horizon System Helpdesk if the error persists
Resetting printer	●	●	★	-

Printer state	Error LED	Manual feed LED	Ready LED	Recovery action
Printer initialising	○⇒●	○⇒●	○⇒●	-

See Section 9.1.4 *Okipage printer consumables* for information on loading paper and replacing the printer's toner cartridge and image drum cartridge.

4.10 Moveable outlets (trolleys holding Horizon equipment)

A number of outlets in the post office are classed as moveable. In these outlets POCL cannot accommodate the standard installation of Horizon equipment where it becomes part of the infrastructure of the office. ICL Pathway caters for the needs of these moveable outlets by siting the Horizon equipment on a trolley.

4.10.1 Locations of equipment on the trolley

