



# Learning Needs Analysis and Strategy Enhanced User Management (EUM) – Phase 2

## 1 Document Administration

Revision Number	Revision Date	Summary of Changes
V0.1	08 Feb 2018	1 <sup>st</sup> Draft for review
V0.2	21 Feb 2018	Feedback from V0.1

### 1.1.1 Approvers and Reviewers

This document requires input from the following stakeholders, who are required to review and/or approve the document, as listed:

Name	Title	Reviewer	Approver
Julie Thomas	Network Development Director	N	Y
Katrina Holmes	Head of Network Gateway	N	Y
Joe Connor	Head of Shared Services	N	Y
Jackie Newton	Head of Learning	N	Y
Esther Harvey	EUM Project Lead	Y	N
Michael Haworth	Network Business Representative	Y	N
Lisa Mobley	Communications manager - network	Y	N
Jayne Bradbury	HRSC	Y	N
Tom Basquille	Learning design & solutions Manager	Y	N
Paul Summers	Project Manager	Y	N
Shaun Turner	Product Owner – EUM Programme	Y	N
Robert Oldland	Learning Technologies Manager	Y	N

### 1.1.2 Review and Sign-off Timescales

Date	Action
08 Feb 2018	V0.1 to be submitted Reviewer feedback required by 15 Feb 2018
21 Feb 2018	V0.2 submitted for final approval Approval required by 02 Mar 2018

### 1.1.3 Referenced Documents

Nr.	Title	Version	Date	Document Ref.	Location
01	EUM BAU Impact Detail	V0 3	21 Dec 2017	None	Learning Design Team SharePoint
02	EUM Scope	email	06 Feb 2018	None	Learning Design Team SharePoint

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## 3 Executive Summary

### 3.1 Introduction

Post Office is undertaking an enhancement of its systems, hardware and network. The Enhanced User Management (EUM) project forms part of the broader network and technology transformation, and is focused on the:

- Provision of ForgeRock, a User Management system which will interface with Horizon Online and the HR system SuccessFactors (SF)
- Provision of a unique Post Office ID (POID) which will be called a Smart ID, will be created in ForgeRock and linked to the Horizon user name
- Capability to control access to Horizon Online transactions if the user has not successfully mandatory compliance learning

To ensure that the learning needs of all colleagues has been properly assessed and a plan agreed to get the changes live, the Learning Needs Analysis and Strategy (LNAS) will:

- Analyse the impact of the change on:
  - Existing branch colleagues and Post Office colleagues
  - Business as usual (BAU) learning solutions for newly appointed postmasters
  - BAU learning solutions developed for all branch and Post Office colleagues
- Identify if a new learning solution is required for existing users, newly appointed postmasters or Post Office colleagues
- Identify all changes that must be made to the existing learning solutions
- Provide indicative costs for new learning solutions
- Provide indicative timescales for updating existing learning solutions
- Recommend how the development and delivery of any new learning solutions for existing users and newly appointed postmasters can be achieved ahead of the change going ahead
- Recommend how updates can be made to existing learning solutions and provide indicative timescales
- Identify any risks, issues or dependencies related to the proposed change and the learning solution requirements

### 3.2 Outline of the Change

The learning need has been assessed during the design phase of the system change, using the project scope supplied by Esther Harvey, project manager.

For phase two of the EUM deployment the scope of the project has been reviewed and updated. The scope is:

	Scope	Description
1	Branch colleague will be able to have multiple sessions live on Horizon but will only be able to use one active session at a time	A user will be able to logon to more than one terminal, each one will be linked back to their one POID, however one session would need to be "locked" for the other session to be active.
2	Horizon training reminders	A series of timed messages will be displayed at login for a Horizon User. They are based on the expiry dates linked to their POID held in Forge Rock. The messages will remind them that they have training due to expire in e.g. 1 week, 4 days, 2 days etc.
3	Continued verification of users in branch	Screen warning prompts on Horizon (randomly displayed), displaying user's name and requesting the user to confirm this is them, with a call to action if not.

	Scope	Description
4	Training Controls	Every time a branch user logs into Horizon the system will check that all of their relevant compliance training is up to date. If the colleague is not compliant they will be locked out of the system or the product.
5	Creation of a new training user role on Horizon Online	When the training controls have locked the branch user out of the system or the product, the colleague will be able to sign into the system using their training role. They must then complete the necessary compliance training and test to give them near real time access back into Horizon or the specific product.
6	Creation of new screen to view branch colleague training records	Each branch colleague will be able to view their own training records. The screen will show : <ul style="list-style-type: none"> <li>Up to date compliance records</li> <li>Expired compliance records</li> </ul>
7	Creation of a Branch Manager office compliance report	Branch Managers will be able to print a compliance report showing all active users' compliance records and expiry dates for their branch.
8	Improvements to drive branch migration and conformance to Smart ID	<ul style="list-style-type: none"> <li>Additional MI reporting to enable appropriate tracking of new scope</li> <li>Automated deletion of previous Horizon IDs to drive use of the new POID</li> <li>Deletion of the Restricted Use ID (RUID) that was delivered as part of EUM phase one.</li> <li>User interface improvements</li> </ul>
9	Increase support for Smart ID deployment	<ul style="list-style-type: none"> <li>Branch Standards team increased to reinforce conformance ahead of training controls being applied</li> <li>Short term increase of NBSC colleagues to support calls once training controls are switched on</li> </ul>
10	Creating an interface between Horizon Online and SuccessFactors Learning using the Post Office Data Gateway	For all compliance tests completed on Horizon Online the data needs to flow into SuccessFactors Learning. The interface must include the individual's POID.
11	Event management information (MI)	To enable some additional MI to be provided to Branch Standards.
12	Emergency Override capability	To enable emergency access back on to Horizon for all branches - to switch off EUM training controls functionality, in a controlled way at Horizon level to restore service immediately.

Note: Items 8 to 12 do not impact the branch learning solution as they support the migration of Smart ID or the system processes not visible to the branch.

Out of Scope: The Counter Training Office (CTO) system will not be updated as part of this project.

### 3.3 Decisions Outstanding and Assumptions

Decision Outstanding	Assumption
Does the project want to provide a hardcopy of the quick reference guide for all branches as outlined in Sections 3.5.1, 4.1.2 and 6.1.1?	The assumption is that a one-off distribution to all branches will be required and funded by the project.  Note: The QRG will also be available electronically.
When should the existing user management process be removed from the CTO classroom course?	The assumption is that there will be at least half of the network live on Smart ID before the classroom training is amended and Smart ID added to onboarding eLearning.



## 3.4 Learning Needs Analysis Summary

### 3.4.1 New learning solution(s)

For newly appointed postmasters and colleagues: No new formal learning is required. They will be trained on the new process as part of the standard onboarding process.

For existing users: They will have access to a Quick Reference Guide, which will be updated by the Learning Team to reflect the Phase 2 changes.

The communication lead will provide instructional emails detailing the system change. Updates to the Horizon Online Help pages should be delivered by the project. These are not within scope for the Learning Team.

### 3.4.2 Updates to existing learning solutions

For newly appointed postmasters and colleagues the material impacted by the change is:

- 4 pieces of CTO classroom learning
- 1 onboarding eLearning module

It is estimated that this will take 6 weeks.

As it has been decided not to upgrade the CTO system it will be necessary to remove the user management section from the CTO classroom training course and move this training to the in-branch training provided by the Network Operations Team.

For existing branch and Post Office colleagues no material was identified as being impacted by the change.

## 3.5 Recommended Learning Solution(s) ROM Costs

### 3.5.1 New Learning Solutions

In the original Learning Strategy it was agreed that the Quick Reference Guides (QRG) would be electronic versions only and therefore no printing costs. The project has indicated that hardcopy versions may be required and the indicative costs are:

Description	ROM Cost
Quick Reference Guide: 2 sided A4 colour laminate x 11,500 copies	£9417 plus VAT

## 3.6 Benefits of Recommended Learning Solution

The new learning solutions will be developed in line with the Learning Academy principles and will provide the following benefits;

- Designed once and delivered to many
- Consistency of the learning experience

## 4 New Learning Solution

### 4.1 Existing User Learning Solution

#### 4.1.1 Introduction

The learning needs for the existing users have been assessed using the project scope supplied by Esther Harvey, project manager.

The following key stakeholders were engaged to agree the learning needs:

Name	Title
Shaun Turner	EUM Product Owner
Michael Haworth	Network Business Representative

#### 4.1.2 Audiences

These are the audiences affected by the proposed change to EUM:

Role	Audience Name	Audience Size	Location (s)	Delivery Method	Delivery Owner
Active Horizon Online Users	Postmasters and Branch Managers	11,500	Nationwide	Quick Reference Guide (QRG) on One website and Post Office Learning Management System	Learning Design Team
				Instructional emails	Lisa Mobley, Comms Manager
				Assumed one-off distribution of hard copy of QRG to all branches	EUM Project
Active Horizon Online Users	Counter Colleagues	53,500	Nationwide	Signposted to QRG on One	Lisa Mobley, Comms Manager
Active Horizon Online Users	Temporary Postmasters	530	Nationwide	Signposted to QRG on One	Lisa Mobley, Comms Manager
Support Services	Human Resources Service Centre	10	Bolton	Communication by EUM Project	EUM Project
Support Services	Network Operation Advisors and Network Operation Managers	60	Nationwide	Question and Answers	EUM Project

Role	Audience Name	Audience Size	Location (s)	Delivery Method	Delivery Owner
Support Services	NBSC Advisors	55	Chesterfield	Communication by EUM Project	EUM Project
Operations	Security and Fraud teams	40	Nationwide	Face to face Training	EUM Project

These audiences are out of scope for the proposed change to EUM:

Role	Audience Name	Reason
Active Horizon Online Users	BFPO Colleagues	They will continue to use their existing Horizon User IDs
Support Services	Financial Services Colleagues	They will continue to report using credence and this will not change
Support Services	Engineers	They will continue to use their Horizon Global User ID

#### 4.1.3 Impact Analysis

Although this is a procedural change which impacts all branch colleagues, a detailed communication will go to each branch via One website and instructional emails. The updated branch Quick Reference Guide will be available electronically. Branch colleagues don't need a formal learning solution for this change. Horizon Online Help operational instructions will be updated by the project to support branch colleagues.

#### 4.1.4 Learning Curriculum

There is no formal learning solution for branch colleagues. The existing Quick Reference Guide will be updated and includes the following:

Learning Module	Learners Topic
Overview	<ul style="list-style-type: none"> <li>What is Smart ID?</li> </ul>
Administration	<ul style="list-style-type: none"> <li>How does a new branch colleague get access to the Horizon system?</li> <li>How is Smart ID used to create a Horizon User ID?</li> <li>Why must mandatory compliance training be kept up-to-date?</li> <li>How can compliance records be checked in branch?</li> <li>How can the user log on to multiple Horizon systems?</li> <li>What is a training user role?</li> </ul>
Frequently Asked Questions (FAQs)	<ul style="list-style-type: none"> <li>FAQs and Answers</li> </ul>
Further Help	<ul style="list-style-type: none"> <li>Where to go for further help and support</li> </ul>

#### 4.1.5 Learning Evaluation

Branch colleagues will receive robust communication and an updated Quick Reference Guide (QRG). There is no formal learning solution and therefore no learning evaluation. The QRG is a piece of support material that will be made available online for access at any time.

## 5 Impact on Business as Usual Learning Solutions

### 5.1.1 Introduction

Post Office has learning solutions to train newly appointed postmasters and colleagues and ongoing learning material to support business as usual activities. There are approximately 300 unique files of various types, hosted on SuccessFactors Learning, Totara and One.

As part of the Learning Team work for the Network Development programme each piece of learning material has been logged on a database. This log is maintained by the Learning Team.

To assess the impact of the EUM changes on BAU learning solutions each file was reviewed looking for specific references to creating a user, logging on, generic trainer logon, Horizon global user names and relevant Horizon screenshots.

### 5.1.2 Learning Materials Requiring an Update

All of the learning materials identified will need updating to ensure that new colleagues have access to current and correct information as part of their ongoing learning.

The learning materials that were current on 22 January 2018 were assessed. A total of 5 BAU learning material files have been identified as requiring amendments. These files will have a final assessment just prior to being submitted to the document owners for amendment.

### 5.1.3 BAU materials for newly appointed postmasters and colleagues

Learning Solution Type	Filename	Description	Change Detail
CTO Classroom	Post Office Onboarding Practical Learning Supporting Notes Day 1	Trainer's notes to accompany Day 1 classroom learning	Page 11 – Remove references to creating user name. This will be need to be trained by the Network Operations Team as part of the in-branch onboarding process
CTO Classroom	Post Office Onboarding Learner Pack A NEW V1.0	Learner's practicals to accompany classroom training	Page 2 - Remove references to creating user name. This will be need to be trained by the Network Operations Team as part of the in-branch onboarding process
CTO Classroom	TRAINER Pack A Classroom Practicals NEW V1.0	Trainer pack to support learner's practicals	Page 4 - Remove references to creating user name. This will be need to be trained by the Network Operations Team as part of the in-branch onboarding process
CTO Classroom	Post Office Practical Learning - Enhanced Customer Transactions (Day3) Training Notes	Trainer's notes to accompany Day 3 Enhanced Customer Transaction classroom training	Pages 2, 5-6 Remove references to creating user name. This will be need to be trained by the Network Operations Team as part of the in-branch onboarding process



Learning Solution Type	Filename	Description	Change Detail
eLearning	Introduction to Horizon Online Learning Module	Onboarding eLearning module to guide learner through Horizon equipment, including how to use the system, setting up passwords and transactions using the Horizon screen	'Getting Started – Passwords' : The Username section will need rewriting and include the new Smart ID process

#### 5.1.4 BAU materials for existing branch and Post Office colleagues

None identified

#### 5.1.5 Timescales for updating BAU materials

It is estimated that the changes should take no more than 6 weeks allowing for signoff and approval.

Signoff and approval process is:

- 1 week Learning Academy QA
- 1 week Tech approval
- 1 week Compliance approval

Timescales for the updates are approximate and subject to variation. The time taken to update materials is dependent on file type, the complexity of the change and owner review and signoff times. It is the responsibility of the BAU document holder to update the BAU learning materials.

Note: The number of files impacted are subject to change since the data is drawn from various working SharePoint sites. These locations are checked weekly for recent additions, deletions or amendments.

#### 5.1.6 Counter Training Office (CTO) Impact

- The upgrade to the CTO system was removed from the project business case. The decision not to upgrade the CTO system means that the user management section must be removed from the CTO classroom training course. A newly appointed postmaster can only be trained by the Network Operations Team as part of the in-branch onboarding process.
- BAU classroom learning is facilitated by Network Operations Advisers (NOAs). They will need to be updated at the time the CTO course is amended.

## 6 Learning Solution ROM Costs

The costs incurred for the creation and distribution of learning materials is the responsibility of the EUM Project.

### 6.1 New Learning Solution(s)

#### 6.1.1 Printing

The indicative printing and distribution costs by 1<sup>st</sup> class large letter for 11,500 quick reference guides by a 3<sup>rd</sup> party supplier (Linney) (as at 09 Feb 18) are:

Description	Volume	ROM Costs
2 sided A4 colour laminate	11,500 copies sent direct to branches	£9417 plus VAT

## 6.2 Updates to Existing BAU Learning Solutions

Nil cost as all updates will be completed in house using Learning Design Team Projects or Learning Academy resource.

## 7 Risks and Issues

The following risk and issue have been identified:

Risks	Mitigating Actions	Impact
There is a risk if the baseline design is changed The consequence is that the timescale for the creation and/or amendment of learning solutions may be impacted	Learning Design Team to work closely with the project manager to keep updated on the project.	

Issues	Mitigating Actions	Impact
The Business will not be updating the CTO system which is used for training newly appointed postmasters which means that they will not be able to learn how to create new users in the classroom	The user management section will be removed from the CTO classroom training course and this training will be provided in-branch by the Network Operations Team	H

## 8 Dependencies

The table below lists the key dependencies for the successful delivery of the learning solution(s) and the updates to the BAU learning solutions:

Key Dependency	Reason why
Learning Design Team to see the final design of all the project deliverables	To ensure that the updates to the Branch QRG and BAU learning solutions are accurate.

## Delivery Plan

Note: Week T0 is the start of Phase 2 rollout and the planned date is subject to change

Weekly Timeline	Planned Date	Activity	Audience	Channel	Collateral	Lead
T-18	14 Feb 2018	BAU comms starts	Branch Colleagues	One website and emails	Articles and instructional emails	Comms Manager
T-14	12 Mar 2018	BAU Learning Solutions update starts			Impacted BAU learning solutions	Learning Design Team
T-14	12 Mar 2018	Smart ID QRG development starts			Quick Reference Guide	Learning Design Team
T-9	16 Apr 2018	QRG Approval			QRG	Post Office
T-9	16 Apr 2018	BAU Learning Solutions update complete			Impacted BAU learning solutions	Learning Design Team
0	20 Jun 2018	Phase 2 Go Live				EUM Project

Weekly Timeline	Planned Date	Activity	Audience	Channel	Collateral	Lead
T+3	10 Jul 2018	Training Control Switch on Starts				EUM Project
	tbc	Final BAU comms	Branch Colleagues	One website and emails	Articles and instructional emails	Comms Manager

## 9 Out of Scope

For existing users a formal learning solution is not required. The Product Manager is responsible for the updating of operational instructions on Horizon Online Help and the Comms manager is responsible for communications to branches.