

**ICL Pathway****Scheduling Strategy**Ref: IM/STR/040  
Version: 1.0  
Date: 02/11/98

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**Document Title:** Scheduling Strategy**Document Type:** Strategy**Abstract:** Documents the strategy by which the Scheduling of the Rollout Events will occur to achieve installation of Horizon counter system in the post office outlets.**Status:** Issue for Approval.**Distribution:****ICL Pathway**Barrie Davies  
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## 0 Document control

### 0.1 Document history

Version	Date	Reason
0.1	12/02/98	First draft of the document for limited circulation only
0.2	02/03/98	Second draft incorporating comments
0.3	5/5/98	Third draft incorporating comments and including updates to thinking around the POCL readiness review and rescheduling.
0.4	19/5/98	Updated with comments, issued for comment.
0.5	29/07/98	Updated with comments, issued for inspection.
0.6	21/09/98	Updated with comments, issued for inspection
1.0	02/11/98	For approval

### 0.2 Approval authorities

Name	Position	Signature	Date
Bob McDermott	Rollout Manager		
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### 0.3 Associated documents

	Reference	Vers	Date	Title	Source
1	IM/STR/0025	2.0	14/7/98	High Level Counter Rollout Strategy	B McDermott
2	BP/TRN/001	2.0	10/11/97	Training and User Awareness Baseline document	L Holt
3	PATH/29/036	0.1	17/11/97	BA/POCL Counter Automation User Awareness - MIB event	M Taylor
4	IM/PLA/010	8.0	23/07/98	Infrastructure Programme Plan Version 8.	S Burgess
5	IM/PLA/010	8.0	21/07/98	Installation Programme Plan Version 8.	S Burgess
6	BD/PRP/002			Implementation Support Data Process	W Kerrigan
7	IM/PRD/004	1.0		Counter Hardware Ordering Process	I Openshaw

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8	IM/REQ/	Inspectorate Requirements	M Fisk
9	IM/REQ/030	Site Preparation Requirements	M Fisk
10	IM/REQ/005	Site Survey Requirements	M Fisk
11	IM/REQ/014	Training Scheduling Requirements	A Barkham
12	IM/STR/	Split Implementation Strategy	B McDermott
13	IM/	Security Capitalisation Proposal	M Fisk
14	IM/	Scheduling Terms & Definitions	C Tebbs
15	IM/	Pre Installation Inspectorate Requirements	J Bates

**0.4 Abbreviations**

BA	Benefit Agency
BAD	Benefit Agency District
DRI	Designated Responsible Individual
FAD	Financial Accounting Division
HSHD	Horizon System Help Desk
NHIT	National Horizon Implementation Team
IP	Implementation Programme
IPP	Implementation Programme Plan
IU	Implementation Unit
InfrU	Infrastructure Unit
InstU	Installation Unit
ISDN	Integrated Services Digital Network
POCL	Post Office Counters Ltd
RoDB	Rollout Database
ReadU	Readiness Unit
RGM	Regional General Manager
RFI	Ready For Installation
SIP	Split Implementation Programme
UAE	User Awareness Event
WTplc	Workplace Technologies PLC

## 0.5 Common Terms

Suppliers	References to suppliers includes POCL in their Supplier capacity
Live	The Horizon system is installed and fully functional, however stock unit migration has not yet taken place and the outlet itself is not ready to proceed with business through the Horizon system
Operational Service	An outlet is said to be in Operational Service in scheduling terms when the Horizon system has been installed and its stock units migrated.
Implementation Programme	Four distinct groups of outlets that are managed as separate rollout programmes.
Sub Programmes	Groups of outlets within an Implementation Programme that are composed of as number of BA Districts, these represents a geographic region of variable size

## 0.6 Changes in this version

All changes are highlighted.

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## 1. Introduction

This document has been produced as one in a series of strategy documents reflecting the processes involved in the implementation of the Horizon counter systems.

The Rollout of the Horizon System is critically dependant on the efficiency of the scheduling process. The process is not complex in respect of each post office but when dealing with nearly 20,000 post offices it produces a logistic complexity. To manage the large number of events involved in the rollout a database has been developed (the Rollout Database RoDB). The concept behind the RoDB is to develop a database that interfaces between all parties involved in the delivery of the Rollout and schedule their appropriate events. The main interfaces are illustrated below:

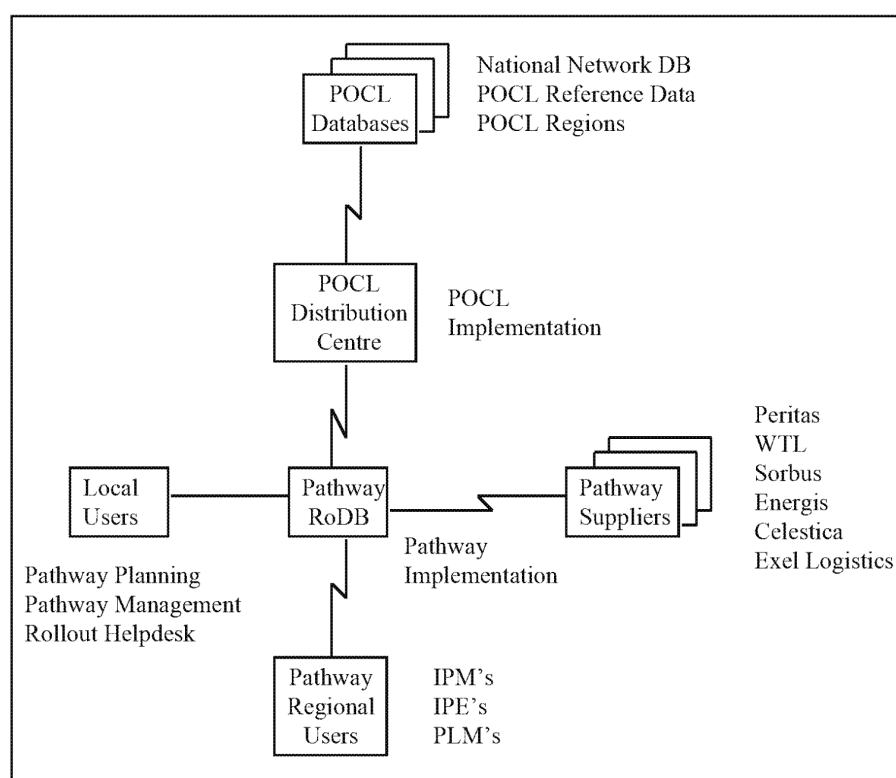


Fig 1.0

### 1.1 Scope

This document describes the strategy of how ICL Pathway and its suppliers will schedule the Rollout events. There will be appropriate references to requirements documents from which the detailed specification of scheduling for each party will be produced.

## 2. The Scheduling Process

### 2.1 Overview

The scheduling process has been defined around the management of Implementation Units (IU) of post offices scheduled in line with the Split Implementation Programme as defined in the Split Implementation Strategy Ref [12]. Throughout the programme each post office outlet is assigned to three different kinds of Implementation Unit.

**Readiness Review Unit (ReadU)** is a four weekly cut of outlets that is delivered to POCL to check the readiness of each outlet to enter the implementation programme.

**Infrastructure Unit (InfrU)** is a weekly cut of outlets that will progress through the infrastructure phase of the programme in the same time cycle.

**Installation Unit (InstU)** is a weekly cut of outlets that will progress through the installation phase of the programme in the same time cycle.

Each of the above units relate to a stage in the implementation process, the creation of each of these is dependant on the successful completion of the previous stage.

The diagram below illustrates the high level scheduling processes which will be applied to each outlet during the course of its implementation. This shows that greater than 300 outlets will need to be put into the front end of the SIP in order to maintain a 300 per week beat rate. The maximum number of outlets that can be entered into a given stage of the SIP will be governed by Supplier contracts & in agreement with POCL.

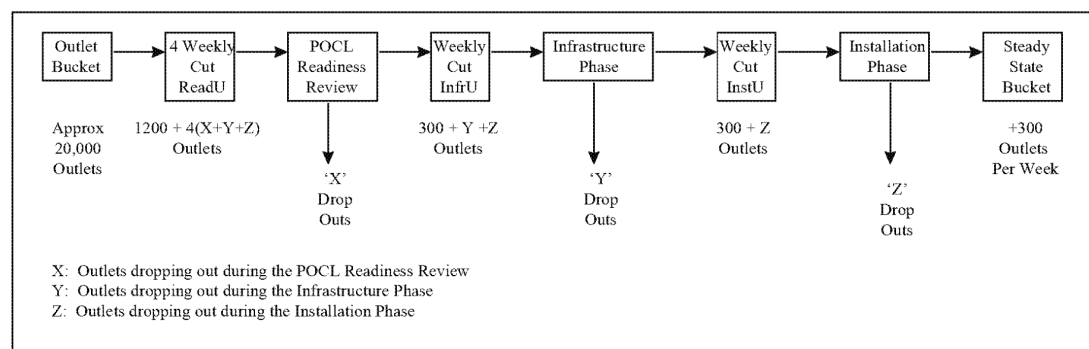


Fig 2.0

The Post Office estate of nearly 20,000 outlets has been divided on a geographical basis into four Implementation Programmes (IP). The IP's are sub divided into Sub Programmes, Benefit Agency Districts which define the relationship between BA and the post offices. The outlets are then further divided into groups defined by the first half of their Post Code, these groups are then sequenced into a geographically optimal order within their BAD to produce a list. Post offices will then be cut from this list at each stage of the programme as illustrated above, at each scheduling point within the process where outlets are cut, rescheduling may take place at key stages between programmes to realign the outlets back into the original geographically optimal sequence.

The flow of scheduling information throughout each phase of the implementation is illustrated in the Split Implementation Strategy [12].

Outlets that are delayed from their targeted progression through the roll out will be suspended within the RoDB, while the issue surrounding their delay is resolved. Once this occurs the outlet will be rescheduled back into the program at an appropriate time and event by assigning it to an alternative Implementation Unit [See Section 3].

## 2.2 Scheduling Constraints

These are the rules which govern the time cycle in which groups of outlets will be entered into and proceed through the SIP.

### 2.2.1 Timing of Events

The timing of the events are detailed in the Split Implementation Strategy - Ref [12].

### 2.2.2 Beat Rate

During national rollout after a ramp up period of three weeks the target number of installations is an average of 300 per week. The ramp up totals are aimed at 125, 175 and 250 installations for weeks 1 to 3 of National Rollout respectively. The ramp up in each IP is outlined below, this is a guideline and will be revised in line with current factors.

	Week1	Week2	Week3	Week4
IP1	35	41	50	50
IP2	32	45	66	80
IP3	32	45	66	81
IP4	32	45	67	89
TOTAL	131	176	249	300

The numbers above vary slightly from the target values and are the actual numbers represented in the Infrastructure Programme Plan Ref [4]

In order to achieve a beat rate of 300 / week it will be required to enter more than 300 outlets into the program to account for outlets dropping out, within the constraints previously defined in section 2.1.

### 2.2.3 Christmas Constraints

As Christmas is the post office's busiest period there is a restriction on when outlets can be entered to carry out work related to the Horizon System. It has been defined that no work will be carried out for 3 weeks over Christmas and that only half the standard beat rate, of each event occurring in an outlet, can be scheduled for the 3 weeks prior to the Christmas shut down, see Ref [1]. The 1 week following the Christmas shutdown will be a self imposed period of reduced activity, due to the practicality of supplier ramp up.

### 2.2.4 Bank Holidays

The spread of the increased beat rate generated by Bank Holidays will be determined by the implementation planning manager in negotiation with affected resource managers.

The working week for the programme will comprise 5 working days. Bank holidays and public holidays are specifically excluded. Where a working week is shortened due to a

bank or public holiday then the daily beat rate will be increased to cater for this. The increase to the beat rate will be spread over a number of weeks to ensure that the increase is manageable for Suppliers with field based resources whilst minimising the amount of rescheduling required. It should be borne in mind that there is a variation of Bank Holidays across the United Kingdom.

### **2.2.5 Outlet requiring particular permission in respect to modifications**

It is anticipated that before any modification or preparation work is carried out in some outlets specific permission may be required. This permission may be due to one of the following reasons;

- Outlet is a grade 1 listed building or has grade 1 listed fittings.
- Outlet is part of a franchise/multiple, see Ref [10].
- Outlet is owned by a Landlord, see Ref [10]

Data in respect to Grade 1 listed buildings has been produced by our suppliers and the franchise/multiple data is supplied & updates by Reference data & POCL Implementation. This information is processed in line with procedures defined in the Survey Requirements Ref [10] . Requirements in respect to Landlords consent are also covered in the Survey Requirements Ref [10].

### **2.2.6 No Fixed Counter Outlets**

These outlets cannot be entered into the Infrastructure programme until a suitable survey process has been agreed.

### **2.2.7 Non-Cash Account Outlets**

These outlets may proceed through the infrastructure programme but will not be entered into the installation programme until they have been converted to cash account status.

### **2.2.8 ISIS (Security Capitalisation Project)**

There are a number of POCL Projects running in parallel with the Horizon automation project. The most significant of these is ISIS which up until recently has been know as the Security Capitalisation Project. Management around this project has been detailed in a separate proposal, Ref [13].

### **2.2.9 Other Constraints**

Other scheduling constraints include:

- Known outlet refurbishment requirements, (This should be highlighted at Readiness Review).
- Non - ISDN data communications, (This will restrict entry into the installation programme if a suitable solution is not available.).

## 3. Rescheduling Processes

### 3.1 SIP Rescheduling Stages

The first stage in the SIP where rescheduling takes place is in selecting outlets for entry into the infrastructure rescheduling terminology is defined in Ref [14]. Outlets undergoing readiness review [Section 4] will be returned to Pathway either as part of a 4 weekly drop as Ack1 or Ack2 or as part of a weekly release of outlets that were previously placed on hold, Ack3 (Wednesday of each week). Outlets that are released after being placed on hold, Ack3's, will be rescheduled back into the programme at the optimal position taking into account geography and the number of outlets in surrounding infrastructure units.

The next key rescheduling stage is prior to entry into the installation programme. The optimal geographic sequence of outlets disrupted during the Readiness Review and Infrastructure phases will be realigned as much as possible prior to entry into the Installation Programme.

The Pathway RoDB will highlight outlets that have been diverted from their optimal position in the implementation sequence at both of these two key stages and present them for rescheduling. Rescheduling will be done by assigning a virtual BA District and Post Code Group to the outlet which will be used solely for determining where in the sequence these outlets will be brought back into the programme (The outlet will retain its own BA District identifier and Post Code for all other purposes). Four separate geographic sequences will be managed in this way, one for each IP region.

### 3.2 Rescheduling during the SIP

Issues arising during the course of the Horizon programme will be managed by the Helpdesk / Regional infrastructure and in some cases will lead to outlets being suspended. This information will be captured on the RoDB by the Rollout Helpdesk who will amend the outlet status to suspended, this data will then be communicated to appropriate Suppliers by means of the overnight interfaces.

When the problems surrounding an outlet suspension have been resolved it will be released via the Rollout Helpdesk to implementation planning for rescheduling. In order to reschedule the outlet back into the programme details surrounding its event history and geography will be investigated and considered in line with the high level programme plans. Once the optimal programme re-entry point is determined the outlet will be rescheduled via the RoDB, the Implementation Planning team will simply assign the outlet to the appropriate implementation unit. This will cause the outlet to fall in line with the new implementation unit such that its subsequent event target weeks will be updated and issued to appropriate suppliers.

### 3.3 Rescheduling - Geographic Considerations

An outlet may be rescheduled back into the Horizon Programme on one of the following basis:

1. Rescheduled back into its own geographic area, having been released from suspension prior to field based resources moving out of the locality.
2. Rescheduled with a group of outlets that is close to the geography of its original group and is being visited at a later period of the rollout.
3. Clustering, where rescheduling of type 1 and 2 is not viable, consideration will be given to clustering. If a number of outlets in a given area have been suspended and subsequently released over a period of time they will be reintroduced into the rollout programme as a cluster and complete the rollout programme together. In such circumstances consideration will be given to the availability of field based resources. A cluster may consist of 2 or more outlets.
4. Where none of the above options are available an outlet will be rescheduled based upon the availability of field based resources.

The above will be determined in consultation with Suppliers, maps and mapping tools will be used where appropriate.

When rescheduling consideration will be given to the number of outlets that have been suspended within a given Infrastructure Unit

Whilst rescheduling during the infrastructure phase consideration will be given to the potential for realignment at the end of the infrastructure phase. The period available to regroup outlets with neighbouring outlets depends on the time period between the infrastructure and installation phases.

## 4. POCL Readiness Review

The Implementation Planning Department will sequence the post office estate in line with the Infrastructure Programme Plan, Ref. [4]. This plan details the breakdown of the estate into Implementation Programmes (IP), Sub Programmes and finally BA Districts (BAD's).

A four weekly cut of Post Offices will be taken in line with the IPP and issued to POCL 6 weeks prior to the RGM letter issue. The Regions will review the readiness of each outlet to enter the Implementation Program. An indication of the readiness of each outlet will be returned to Pathway 3 weeks after issue of the Post Offices to POCL.

The POCL Regions will also verify reference data related to the ReadU during this period, this will include an assessment of the number of counters positions to be automated for each outlet if this has not previously been determined.

Outlets that are not ready for the implementation program will be put on hold by the POCL Regions while they resolve the associated issues, at which point they will be released to Pathway for inclusion in the SIP. An outlets that has been placed on hold for a significant period of time may miss out on being rescheduled back into the infrastructure program with its own geographic group. Other rescheduling options will then be considered and may lead to the outlet being scheduled back into the program at much later date. Therefore it is in the interest of the outlet manager as well as POCL and ICL Pathway to restrict the time period outlets are placed on hold. Example reasons for placing an outlet on hold are:

- Outlet has been identified for refurbishment which must be completed before being included as part of the Horizon programme.
- Outlet has been scheduled to undertake activities as part of another POCL programme that will introduce serious conflict with the Horizon implementation schedule.
- Outlet is temporarily closed.

The outlets ready to go ahead with the Horizon implementation programme will then be placed in an RODB table ready for assignment to appropriate infrastructure units. The InfrU are then produced in line with the BAD sequence defined in the Infrastructure Programme Plan, Ref. [4].

## 5. Infrastructure Phase

### 5.1 Activating Infrastructure Units (InfraU)

The number of outlets selected for inclusion in an infrastructure unit will be aimed at achieving the required beat rate of 300 installations per week. This will require a minimum of 300 outlets to be selected, plus a variable number of additional outlets to allow for delays and drop outs. The variable number will be determined by utilising historical data and data modelling tools. Consideration will also need to be given to the number selected for each IP in order to ensure each region stays on target with the Infrastructure Programme Plan, Ref [4].

Once the number of outlets in an InfrU has been selected for each IP these will be logically grouped and activated within the RoDB. This takes place two weeks

prior to issuing of RGM letters and instigates the issue of start/finish dates for particular events to NHIT, Peritas and WTplc. NHIT receive the target week for issuing the RGM letter, Peritas receive the target week for issuing the Invitation for the Management Infrastructure Briefing (MIB) and the week for the MIB event. Finally WTplc receive the target weeks for Pre Survey Call, Site Survey and Preparation.

From issue of the InfrU two weeks are available to perform preparatory tasks prior to commencement of the SIP proper. This time is utilised by POCL Regions to prepare RGM letters for each of the post offices in the InfrU. It also gives Peritas additional time to organise briefing venues and schedule outlet managers to the appropriate location.

### 5.2 RGM Letter

Each outlet in an Implementation Unit will receive from their post office region an RGM letter. The letter is the first official contact with the outlet. NHIT are required to notify the RoDB by the Wednesday of the appropriate week that the letters have been issued.

### 5.3 Management Infrastructure Briefing

The outlet manager at each outlet in the Implementation Unit is invited to attend a Management Infrastructure Briefing. Details of the contents of the Management Infrastructure Briefing is documented in Ref. [3]. The issuing of the invitation to the MIB is dependant on confirmation that the RGM letter has been sent. The MIB invitation will be issued at least 4 weeks prior to the event being held.

At the MIB, outlet managers will be asked of their availability for the target survey call, survey and preparation weeks. This will help identify potential problems with the scheduling of these activities later in the programme and the information will need to be logged on the Horizon System Help Desk (HSHD). To minimise the need for rescheduling, a DRI (Designated Responsible Individual) should be nominated at the MIB to act on behalf of the Post Master should they be unavoidably absent during identified activity periods.

All outlets with a representative attending a MIB are confirmed via the RoDB. All non attendees are also reported via the RoDB with confirmation that they have been sent a pack of information which describes the forthcoming infrastructure activities.

## 5.4 Site Survey call

The Site Survey call is dependant on a representative member of the outlet having attended a MIB or receiving a MIB pack. This information will be available via the RoDB to WTplc.

A telephone call is made to each outlet to arrange the site survey and preparation dates. Outlet managers will be asked to agree their availability for the survey and preparation activities based on target weeks. If the outlet manager is available then dates will be agreed for the survey and preparation activities. If the outlet manager is not available to attend Survey or Preparation, confirmation that the DRI is available will be sought, in exceptional circumstances where neither is available during the target weeks they are asked for the duration and timing of their unavailability. On the basis that the majority of people take up to 2 weeks holiday at one time, the outlet manager will be advised that the dates will be either 1 or 2 weeks after the target week as appropriate. During the Site Survey call, agreement will be reached with the outlet manager as to whether the survey activities are carried out in the morning or afternoon and that preparations are commenced in the morning. The call will also identify an individual at the outlet who can authorise any work to be carried out. This may be the outlet manager or a Designated Responsible Individual at the outlet.

Consideration will be made for outlets that need to agree the dates/times with their landlords. Two prospective dates/times will be offered and the outlet will be contacted two days following the initial contact to find which date/time is acceptable to the landlord.

Details of the site survey call is provided in the site survey requirements document Ref [10].

Successful calls result in the RoDB being updated with baseline dates for the survey and preparation events and whether the activities are to be carried out in the morning or afternoon. After 3 unsuccessful attempts to contact an outlet a call will be made to the appropriate POCL contact. At the end of the week all outlets that could not be contacted will be issued to the POCL Region with appropriate information on why they were not successful. The process for managing these post offices back into the programme is outlined in the rescheduling section of this document [Section 3].

## 5.5 Site Survey

The Site Survey is dependant on a date being agreed with the outlet manager at the Site Survey call. The site survey process is defined in detail in the Site Survey Requirements Document Ref: [10]. Following the Site Survey the RoDB will be notified of any additional Re-surveys or Modifications that are required in the outlet. This information determines the additional events to be scheduled for the outlet ie whether the outlet requires a Re-survey and /or Modifications.

The Site Survey work is completed within one working day. Notification of Site Survey being complete on the Baseline date will take place on the overnight interface to the RoDB, this notification will be forwarded the to POCL on the same night. Non completion will be notified via the Rollout Helpdesk and confirmed when complete via the RoDB.

Up to 40% of Site Surveys will be attended by POCL, fluctuations in the number of Site Surveys to be performed around the 300 beat rate will be indicated to POCL and

Suppliers by the RoDB approx 10 weeks in advance and via Survey Schedules approximately 1 week in advance. Any decisions to make sustained increases to the number of surveys will be agreed with suppliers as per contracts and notified to POCL as far in advance as possible.

## 5.6 Site Re-survey Call

The Site Re-survey call is dependant on the outlet being registered as requiring a Re-survey at the Site Survey. The Target week for the Re-Survey Call and Re-survey will be in line with the Split Implementation Strategy, Ref [12], unless dates were agreed at the Site Survey call in each of the weeks following the target IU week. If this has occurred all the subsequent Infrastructure events will move forward the same number of weeks. Again if the outlet manager is unavailable during this period the DRI should preside.

The Baseline date & time will be sent to the RoDB following agreement with the outlet. This information will be forwarded to NHIT to organise the appropriate POCL attendance, POCL will attend 100% of resurveys.

## 5.7 Site Resurvey

The site resurvey will be dependant on the date/time being agreed with the post master at the Site Re-survey Call and advising POCL of the requirements for attendance.

On completion of the Re-survey the Actual date will be reported to the RoDB as will notification that the outlet requires screen parts and/or modifications.

## 5.8 Pre Modifications Call

Commencement of this event is dependant on completion of the Re-Survey with the purpose of confirming a date for Modification works.

## 5.9 Pre Preparation Call

The outlet is to be contacted to confirm the Preparation date. Where applicable this call is also an opportunity to check that the post master has completed any works they have agreed too

## 5.10 Site Modifications

The site modifications are dependant on quotes for alterations being authorised and the date for the work being agreed with the outlet. If appropriate the landlords consent to carry out the modifications is also required. Site modifications are those activities carried out in an outlet which have to be performed by a specialist organisation.

In some cases it may be necessary to close the outlet to enable the work to be carried out. This usually applies where the modification work carried out in the outlet affects the security of the outlet. Notification of Modifications being complete on the Baseline date will take place on the overnight interface to the RoDB. Non completion will be notified via the Rollout Helpdesk and confirmed when complete via the RoDB.

All site modifications have to be complete prior the Site Preparations commencing.

## 5.11 Production of outlet labels

As part of the Site Preparation process, document Ref [9], a label is fixed to a wall in the outlet to signify the ISDN circuit position.. These labels have to be ordered in batches of approximately 500 with a 7 week lead time. They will be required for inclusion in the Site Preparation pack which is assembled the week following the Pre Preparations Call. Therefore the order will need to be placed at least 11 weeks prior to the Preparation.

The labels are produced from information supplied by the RoDB.

## 5.12 Site Preparations

Site preparation activities are those which are carried out after any modification work has been completed to prepare the outlet ready for installation of the Horizon counter equipment. Where applicable an authorised landlords consent form will need to be returned by the outlet manager, this would have been issued to the outlet manager following site survey.

The site preparation work is usually completed within one working day. Notification of Preparation being complete on the Baseline date will take place on the overnight interface to the RoDB within 48 hours of the preparation taking place. Non completion will be notified via the Rollout Helpdesk and confirmed when complete via the RoDB.

Preparation of ECCO outlets will be scheduled to avoid taking place on Wednesdays when cash accounts are balanced.

The only exception to the Preparation being complete in one day is the connection of electrical tails which will be completed within 2 weeks of the Preparation date.

### 5.13 Ready for Installation

Ready for installation occurs a week after the Preparation, which accommodates the return of the Preparation pack and the subsequent issue of the Completion Pack to ICL Pathway. The Completion pack may be held for up to 2 weeks following Prep awaiting the connection of electrical tails by the local electricity board. Arrangements are made for the electrical tail circuits to be connected through the appropriate regional electricity board.

Once a post office is registered as Ready for Installation it is available to enter the Planning phase prior to the Installation Phase.

### 5.14 Inspectorate

The contract defines that 10 percent of the outlets will be inspected for the quality of preparation. Since the introduction of the Split Implementation Plan the timing of this inspection has required revision. Due to the Preparation of the outlet and the Installation of the ISDN now occurring on different days it has been agreed that half the inspections will take place following the preparation and the other half following the ISDN Installation.

The first half of the inspections are selected the week after RFI is achieved unless the outlet requires electrical tails in which case it may be selected the week following completion electrical tail works upto 3 full weeks after the preparation has taken place. Details of this activity including the selection criteria are detailed in the Pre Installation Inspectorate requirements document, ref [15].

This 2 week period is to allow for the confirmation of tail connections. The inspections are then scheduled and the planned Inspection dates, being 2 weeks hence, agreed with the outlet manager. The dates for the Inspection will be available to those parties required to attend the inspection.

On completion of the Inspection the inspector will notify the results to their responsible manager. If the outlet has passed the inspection the inspection report will be issued by post to the responsible manager. If on the other hand it fails the inspection the report will be both faxed and issued by post to the appropriate manager. Resolution of faults highlighted during inspection will be managed by the inspectorate service provider, once resolved the outlet will be re-inspected for confirmation.

## 6. Installation planning phase

At least four weeks prior to the commencement of the Installation Phase and following the Infrastructure Phase there is a 4 week Planning Phase. This phase is for the scheduling of post offices prior to entering the Installation Phase and agreeing baseline dates for key events.

It is anticipated that a buffer of Post Offices that are 'Ready for Install' will be created between the two Implementation Phases. This will have two major benefits, firstly to help ensure there is always enough Post Offices available to enter the Installation Phase at the required rate and secondly providing additional time to ensure optimal sequencing of outlets.

The number of outlets selected for inclusion in an installation unit (InstU) will be aimed at achieving the required beat rate of 300 installations per week. This will require a minimum of 300 outlets to be selected, plus a variable number of additional outlets to allow for delays and drop outs. The variable number will be determined by utilising historical data and data modelling tools. Consideration will also need to be given to the number selected for each IP region in order to ensure each region stays on target with the IPP Ref [5].

Once an InstU of post offices has been activated in the RoDB related scheduling information will be issued to appropriate suppliers, including POCL for HFSO scheduling. Exel will be issued target weeks for Installation, Energis provided with target ISDN install dates and Peritas issued with target weeks for User Awareness events.

ISDN lines will not be required at outlets which are already installed with ALPS equipment (subject to commercial agreement). Endeavours will be made to agree installation dates for ECCO offices so that they are evenly distributed across the week.

The agreed baseline dates are submitted to the RoDB for the remaining Installation event dates to be calculated.

## 7. Installation phase

The installation phase covers those activities required for the installation and delivery of the Horizon equipment in the post office outlets. Entry to the Installation phase is dependant on the post office completing the Infrastructure phase and Planning phase. On entering the Installation phase the outlet will have agreed Baseline dates for the key events and the appropriate suppliers will have been notified of planned dates for their events. It is envisaged that only a very small percentage of outlets will drop out of the programme once entering the Installation phase. These drop outs will be rescheduled in line with the processes outlined in Section 3.

Completion of the installation phase results in the outlet moving to the in office data migration and acceptance phase.

### 7.1 Forecast to hardware suppliers

Information provided by the RoDB to Celestica allows a forecast to be provided to hardware suppliers for the equipment required to satisfy the installation. The forecast is derived from figures based on the number of counter positions to be automated, number of back office systems and the office printer type, in accordance with Ref. [7].

### 7.2 Issue Invitation for the User Awareness Event

A minimum of 4 weeks prior to the User Awareness event the outlet will receive an invitation informing them of the UAE venue and reminding them of the dates agreed for data communications & Horizon installation. The RoDB will receive confirmation of the UAE Invite being issued.

Included with the invitation will be a questionnaire in respect of requirements for training. If this questionnaire is not returned within 8 days the outlet will be contacted by telephone to collect the information. This discussion will be confirmed in writing. This process is defined in detail in the Training Scheduling Requirements Document Ref 11.

### 7.3 Firm hardware requirements

A firm committed hardware forecast will be issued to Celestica on a four week rolling basis, 8 weeks prior to installation of the Horizon system.

## 7.4 User Awareness Event

To ensure that all appropriate outlet staff understand the Installation series of events, a User Awareness Event is arranged. Details of the contents of the User Awareness Event is documented in Ref. [2]. Attendance on the User Awareness event will be dependant on the invitations being issued 4 weeks prior to the event.

The User Awareness event is designed to offer a detailed explanation of what is expected of the outlet manager and staff, and what they should expect to happen during this phase. By this stage all the dates appropriate to the outlet manager have been agreed, with the exception of the training date.

Non attendees of the UAE will be sent a User awareness pack to explain the forthcoming events.

## 7.5 Invitation to training

Information collated at the User Awareness Event will allow the training requirements for each outlet to be scheduled and the venues confirmed. Once training venues are established invitations are sent to outlet staff via the outlet manager. Details of the invitation to training is provided in the training strategy Ref. [2]. This process is defined in detail in the Training Scheduling Requirements Document Ref [11].

## 7.6 Auto configuration of the Horizon Counter equipment

All Horizon equipment will be built with a minimal configuration. On installation the outlet specific configuration will be transferred to the counters. To undertake this configuration an Auto configuration system has been developed. This system requires certain reference data for the outlet which is supplied by the RoDB. The interface is triggered 30 days prior to the Baselined Installation date and will be updated with any changes up to the point the Auto configuration system configures the counters.

## 7.7 Communications line installation

The ordering and confirmation of the Communications Line (In the majority of cases this will be ISDN) installation date was completed during the Planning phase. Data communications will be installed at the outlet, with the exception of Alps offices that already have an ISDN line that can be utilised by the Horizon system in those offices. Furthermore approximately 2% of outlets will not have ISDN coverage and an alternative means of communication will be installed., under these circumstances the same scheduling processes will be followed and the most appropriate type of communications link installed

Where an ISDN line is installed it will be monitored by Energis at agreed times relative to the time of install. Should the ISDN line fail this will be detected by Energis and rectified before installation of the Horizon equipment.

Should a failure on the ISDN line be detected within 2 days of the baseline installation date and it is anticipated that the Horizon counter equipment installation may be affected, then telephone escalation to ICL Pathway will occur.

Confirmation of the ISDN installation will take place no more than 2 days after the date of installation.

## 7.8 Inspectorate (Phase 2)

The second phase of inspections will be scheduled to follow the Installation of the ISDN line. The outlets will be selected in a similar manner to those selected for phase 1 inspections as outlined in ref [15]. These inspections will be conducted 2 days after ISDN installation where this can be agreed with the outlet manager.

resolution. Once resolved the outlet will be re-inspected for confirmation. There is a very short period for resolution of failures so the systems may be short circuited as long as the audit trail via the Rollout Helpdesk is retained. The process for this escalation is detailed in Ref. [8].

## 7.9 Instruction to Parcel Force & MRM

Details of outlets which are to be installed with the Horizon equipment are passed via the RoDB and electronic mail to Parcel Force 10 days prior to installation. Parcel Force then deliver packs of leaflets and posters to the outlets the week prior to the Installation.

Outlet details are similarly passed to MRM Promotional Services who will arrange for posters and leaflets to be delivered to Benefit Agency offices and Job Centres.

## 7.10 Build of the counter systems

The equipment that will be delivered to the outlet will be tested and packaged into boxes known as overshippers. The forecast information will be available as detailed in Ref. [7]. The appropriate overshippers will need to be available at least 5 days prior to Collection.

## 7.11 User Training

The outlet manager & staff attend a specialised training event to ensure they are suitably prepared to operate the Horizon counter equipment. The Invitation for these training events will have been issued under the constraints defined earlier, at least 4 weeks prior to the event taking place. The training events are scheduled to be complete no earlier than 5 days prior to the Installation. Before the installation of the Horizon equipment can take place in the outlet, a minimum number of users must have passed the competency test to use the system. The criteria for minimum training requirements will be agreed by Pathway & POCL training teams.

The RoDB will be notified when the training commences for an outlet and when minimum training compliance has been achieved.

Management of the scheduling of training is detailed in the Training Scheduling Requirements Document Ref [11].

## 7.12 Collection of overshippers

Between 1 and 5 days prior to the Baselined Installation date the appropriate overshippers will be collected from Celestica. Once collected the overshippers will be distributed to the appropriate distribution depot and be available for loading on the delivery vehicle.

## 7.13 Equipment installation

The installation is dependant on the outlet being prepared, the data communications being operable, the minimum training compliance achieved and the Horizon equipment available for installation. The delivery vehicle will be scheduled to arrive am or pm on the Installation day. Dependant on the number of counters Installation will take up to a day to complete, the installation will take place in the outlets hours of business. Once the equipment has been installed and the auto configuration taken place the system is considered to be Live (This is 'Live' in so much as the Horizon system is installed and fully functional and therefore supported by the ICL support infrastructure from that point onwards, however until migration of stock units has taken place the Post Office itself is not ready to proceed with business through the Horizon system). When the system is Live the installer will request a signature from the outlet manager for acceptance of the installation and they will log a call on the HSHD (NB. This may be the Rollout Helpdesk) as confirmation.

## 7.14 Completion of the installation phase (Migration)

Scheduling of migration activities will be done based upon the baseline dates of installation, any deviations in this will be reported via the Helpdesk / Regional infrastructure to affected parties. With the system Live the Migration team will assist the outlet staff in migrating the outlets accounts onto the Horizon system.

On completion of Migration the outlet manager signs the acceptance document for the system in Operational Service. If this is not achieved by 11:30 on the day following notification of Live status a call will need to be logged on the HSHD (NB. This may be the Rollout Helpdesk) to hold the instruction that the system is in Operational Service that is issued to the Benefits Agency.

Completion of migration activities will also result in updating the outlet status to Operational, this will be forwarded to POCL and interested Suppliers by means of the overnight interfaces.

## 7.15 Issue of the Equipment Indicator

At 12:00 on the day following Live installation and assuming there have been no problems with migration, a file is issued to the Benefits Agency containing the outlets FAD Code and the equipment indicator. The equipment indicator is a number that defines the type of automation available at the outlet.

The outlet then passes to steady state for future management.

The method of capturing this data and supplying it to the Benefits Agency is currently under review. Enhancements have been proposed to drive this through main Horizon system.