Document Title:	Counter Managers Course Specification
Document Type:	Specification
Abstract:	This document contains the current course specification for the Counter Managers course.
Status:	APPROVED
Distribution:	Jim Flynn (ICL Pathway) Steve Lovegrove (ICL Pathway) Simon Robertson (ICL Pathway) ICL Pathway Library Ann Cocker (Post Office Counters Ltd) Douglas Craik (Post Office Counters Ltd) Steve Grayston (Post Office Counters Ltd) Trevor Rollason (Post Office Counters Ltd) Post Office Counters Ltd Library Kevin Fletcher (KnowledgePool) Stuart Kearns (KnowledgePool) KnowledgePool Library
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0   Document control

0.1   Document history

Version	Date	Reason
2.0	18/10/99	Contains amendments made following Evaluation Exercise in July 1999. Document is based on the courses presented as Dry Runs to Post Office Counters Ltd and signed off by Trevor Rollason in September 1999.

0.2   Approval authorities

Name	Position	Signature	Date
Andy Barkham	Training Development & Evaluation Manager, ICL Pathway		
Trevor Rollason	User Implementation Manager, Post Office Counters Ltd		
Stuart Kearns	Training Project Manager, KnowledgePool		

0.3   Associated documents

Reference	Vers	Date	Title	Source
SU/TRN/018	2.0	21/7/99	**Counter Managers (2 Day) Training Course**	KnowledgePool

0.4   Abbreviations

FUJ00001356
FUJ00001356

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0.5 Changes in this version

0.6 Table of content

1   Introduction

This document contains the course specification to be used by KnowledgePool trainers when presenting the Counter Managers training course.

2   Specification

2.1   Counter Managers Training Course Specification – Day 1

2.1.1   Introduction

- Welcome by Trainer
- Venue administration
- Course Objectives
- Course Agenda

2.1.2   Getting Started

- Objectives
- Hardware Overview
- POLO connect procedure – emphasise card and PIN security requirements
- POLO connect all other systems in office (also the post power failure reconnection procedure)
- Paper Roll replacement
- Ribbon Cassette cartridge replacement
- Log on
- System forced change password
- The Desktop menu
- Log out

- Basic Navigation

- The Serve Customer menu

- The Other Products menu

2.1.3 EPOSS Intro

- Objectives

- The Settlement menu

- Basic Sales using the Quantity & Bin functions

- Multiple Sales using Open & Close functions

2.1.4 EPOSS Cont:

- Objectives

- 'Advanced' EPOSS Sales using GiroBank, NS, Licences menus etc

2.1.5 EPOSS Scales

- Objectives

- Sales using Horizon Scales incorporating Additional Services, Prepaid postage & Best Fit

2.1.6 EPOSS Rems & Reversals

- Objectives

- Remittances

  - In From Other PO

  - In From Supply Div (or SSO as appropriate)

  - In From Client.

- New Reversals

- Existing Reversal

- Transaction Log search

2.1.7 OBCS

- Objectives
- ESNCS – Electronic Stop Notice Computer Service
- OBCS Stops List
- Health & Safety points re the Bar Code Reader
- Encashment Process
  - Encashment – normal, manual (bar-code damaged and bar-code reader failure)
  - Impound Notices
  - Recall Notices
- Issue Order Book
- Receive In process

2.1.8 APS

- Objectives
- APS Card transaction
- APS Bar-code transaction
- APS Card manual transaction
- APS Reversal
- APS Fallback & Recovery

2.1.9 Functions & Trans Log

- Objectives
- The Functions menu
  - Shopping Mode
  - PLU List
  - Temp Lock
  - Session suspend:
- Transaction Log

- Search

2.1.9.1 Help & Basic Maintenance

- Help Icon,
- Workbook,
- HSUG,
- Helpdesk,
- POCL Helpdesk (NBSC)
- RNM's etc
- Basic Maintenance
- Contingencies
- Training Mode Demonstration
- A4 Printer - Load paper.

2.1.10 End of Day Procedure

- Objectives
- Counter Daily Reports & Cut Off
  - Reversal from report
- Cheques Listing
  - Report
  - Rem Out Cheques
  - Cheques Listing & Cut Off
- ONCH declaration
- Office Dailies
- End of Day

2.1.11 Shop 'Till you Drop

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Practical exercise where delegates go through a 3 day practical exercise. Day 1 is carried out with the Trainer, days 2 and 3 are carried out by the delegate.

2.2 Counter Managers Training Course Specification – Day 2

2.2.1 Day 2 Introduction

- Day 2 Agenda

2.2.2 Workbook 9 – Office Setup

- Objectives
- Create new
  - Access Levels
- Modify user
- Introduce Stock units
- Stock unit variations
  - Individual SU
  - Shared SU
  - Default SU
- Create Stock unit
- Transfer Out
- Attach users to Stock Units
- Transfer In

2.2.3 Workbook 10 – Individual SU

* Emphasise parallels with existing manual balance, balance process slide on view throughout module

- Objectives
  - Define CAP & BP

- Balance process for Individual SU's
- Print the Balance Snapshot and compare stock against it
- Adjust Stock
  - Complete a physical check against the Balance Snapshot
  - If there is a requirement, adjust stock as necessary
- Declare the Stamps held
- Declare Cash
- Produce the Trial Balance Report
- Rollover the Stock Unit into the next CAP

2.2.4 Shared Stock Units

* Emphasise parallels with existing manual balance, balance process slide on view throughout module

- Objectives
- Shared SU Balance process
- Reiterate End of Day Procedure
  - Counter Weeklies
- Check Summaries
- Non Accounting Data
- Parcel Traffic
- Negative stock
- Balance snapshot
  - Check stock against snapshot
- Suspense Account
- SSU declarations
  - Adjust Stock
  - Declare Stamps by volume
  - Declare Cash
- Produce Trial balance Report
  - Rollover Stock Unit into the next CAP
- Reclaim Vouchers from suspense account

2.2.5 Cash Account

* Pair up delegates for this module

- Objectives

- Ensure all SU's are Balanced

- Mention Inactive Stock Units

- Office Balance Snapshot

  - Optional for multi SU offices

  - Not reqd for single SU offices

- Preview Office Weekly reports

  - Suspense Account in the exercise folder

- Cash Account

  - Trial CA report, if happy rollover the office, 2 copies of Final CA report produced

- Correction Stock Unit

  - Create Stock Unit

  - Carry out transaction on system

  - Print & Cut off any Daily/Weekly reports

  - Declare Stamps, Stock and Cash as required

- Reproduce Cash Account report

- Delegates in pairs return to system not used and carry out a similar example

2.2.6 Wash Up

- Questions

- Course Objectives

- Delegate Appraisals

2.2.7 Counter Managers PSA