

Post Office Limited

Counter Training Office (CTO) PoS Training System Requirements

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Terms and Abbreviations

TERM	MEANING
DVLA	Driver and Vehicle Licensing Agency
APOP	Automated Payments Out Payments
BFCT	British Forces Counter Training
CTO	Counter Training Office
BTTP	Branch Technology Transformation Programme
FOA	Front Office Application
BFCT	British Forces Counter Training
PoS	Point of Service
HOL	Horizon Online™, the current PoS system used in branch and some admin sites

Document Control

1.1 Version History

VERSION	DATE	CHANGE DETAILS	AUTHOR
0.01	08.01.2016	Initial draft	Alina Lingard

1.2 Referenced Documents

NR.	TITLE	VERSION	DATE	DOCUMENT REF.	LOCATION
1.	HNG CTO Emulated Responses	2.73	09.10.2008	DESGENREP0006 v2 8 CTOSimulator.doc	FOA Training Sharepoint
2.	HNG-X Training Strategy (CTO) Agreed assumptions and constraints	2.2	25.01.2016	REQCUSSTG0004.doc	FOA Training Sharepoint
3.	FOA Contract Extract Training Requirements	V1.0	08.01.2016	IBM Contract Extract	FOA Training Sharepoint

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Introduction

1.3 Background

Post Office is undertaking a major transformation of its IT systems, hardware and networks, this is known as the Branch Technology Transformation Programme (BTTP).

The replacement of the existing Point of Service (PoS) system, Horizon Online™, used in all Post Office branches, British Forces branches, some admin locations and Counter Training Offices (CTO's) is part of BTTP and is known as the Front Office Application (FOA) Programme. The CTO's are used to train all new postmasters, WH Smith colleagues and Post Office branch colleagues.

Each CTO classroom is a live branch on Horizon Online using live reference data but all transactions processed are clearly differentiated so that training transactions are stored separately from the live transactions. All receipts and printouts from the transactions are clearly marked as void. The data centre provides simulation capabilities for online transactions.

As at 8 February 2016 Post Office core data shows:

Branch Type	Description	Number of branches	Number of terminals
CTO	Counter Training Office	43	236
BFCT	British Forces Counter Training	8	24
TOTAL		51	260

Scope Boundaries

To migrate from the existing Horizon Online system to a new PoS system, the **supplier** must provide a number of training deliverables:

Supplier Deliverable:	Description
1. CTO PoS system training environment	<p>A system to allow training of new postmasters to be delivered in the designated Counter Training Offices (CTO) and in British Forces Counter Training offices (BFCT)</p> <p>Note: System to support the use of practical exercises using physical training materials i.e. barcoded bills, training</p>

	debit cards etc
2. PoS training mode	A system to allow training of branch colleagues using the PoS equipment. Note: Physical training materials will not be available in branch
3. New PoS E-learning	Conversion training for all existing Horizon Online users - branch and support services System simulations 'Show me' 'Guide me' and 'Let me try' covering some key areas: <ul style="list-style-type: none">• Intro to new PoS, system navigation, generic system design changes• Customer transactions• Balancing and accounting• Where to find help Training assessments must be completed and all training must be tracked for reporting back to Post Office
4. New PoS workbooks	Training workbooks that mirror all the training modules provided via E-learning
5. Train the trainer	<ul style="list-style-type: none">• Train the Post Office trainers• Train the supplier migration support teams

To migrate from the existing Horizon Online system to a new PoS system, the **Post Office** must complete a number of training deliverables:

Post Office Deliverable:	Description
1. CTO PoS system training environment	Update all training materials used to support the 3 day CTO classroom training course used to train new entrant postmasters and British Forces branch colleagues Work with BAU training team and highlight any changes that could be made to the CTO 3 day training courses to include any new transactions and functionality now available on the CTO system e.g. travel insurance quotes, recovery procedures etc
2. PoS training mode	Create training instructions for branch colleagues so they understand the capability of the new training mode and how to get the most out of the system

3. New PoS E-learning	<ul style="list-style-type: none"> • Update existing e-learning to reference the new PoS system. • After the migration is complete, amend the e-learning used to convert all Horizon Online users to the new PoS system, removing all references to 'what's changed' and make it available on the Post office Learning Management System (LMS)
4. Train the trainer	<ul style="list-style-type: none"> • Train all existing CTO trainers on the new PoS system and the updated training materials and new CTO capability • Train all Field Change Advisors on the use of Training mode in branch
5. Migration support training	Train all of the new PoS migration support team
6. Support services training	<p>Train all of the business support services that use the PoS.</p> <ul style="list-style-type: none"> • NBSC • Finance Service Centre • Audit & Legal • Security - Fraud team

1.4 In Scope

This document details the business requirements for the supplier training deliverable: 1. CTO PoS system training environment.

The business requirements for the PoS training environment are the same for both CTO and BFCT branch types, so **in the business requirements read CTO to mean both CTO and BFCT branches**

1.5 Out of Scope

This document does not cover the rest of the supplier training deliverables.

1.6 Business Requirements for the CTO PoS training environment

1. Each branch will be part of the live estate using the existing unique branch codes.

2. The data centre must support training transactions - The training environment will share the data centre elements of the solution with the Live service - however training transactions must be segregated from Live transactions within the application, so that there is no risk of contamination of live data.
3. The data centre must provide simulation capabilities for online transactions, and storage of training transactions separately within the training part of the branch database
4. Each training branch must be established and managed as a logical branch
5. When in use for training sessions, each counter will perform as a virtual branch independently of other counters in the branch
6. PoS Reference data must distinguish the CTO branch as for use only as a training branch. It must use the allocated set of dedicated CTO branch codes (90XXXXX) within the Live estate and fully manage the CTO branches within the reference data system
7. A branch is designated as either Live or Training and cannot change between the two.
8. The training branches will have their own reference data that defines the branch and the products they can trade.
 - CTO: This reference data will be identical in every CTO
 - BFCT: BFPO rules apply for every BFCT
9. CTO branches must be automatically kept up to date with Live Reference data. Post Office may specify additional training products within Reference Data.
10. CTO branches must be maintained and updated in line with the live environment
11. CTO branches must receive Post Office software and software updates required to maintain the training solution in line with the live environment and processes
12. As new products etc are introduced, the training solution must be kept in step. This may include AP-ADC transactions or products that require software changes. **Note:** this does not include new online services which require changes to the online service simulator to allow them to be used.
13. The CTO training environment must have access to the live online help files

14. The CTO training environment must have access to the live PAF files.
15. It must be as realistic as the live branch experience, with the same look and feel.
16. It must support all live transactions, modified as appropriate by the use of emulators where the transaction relies on a third party system to allow the transaction to complete. This live transactions will include
 - How to transact all major product types
 - How to produce and check end of day reports
 - How to produce a branch balance
 - How to perform system admin tasks such as; change a user password, assign a user to a stock unit, how to pair a PIN pad with the base unit
17. It must be fully compatible with all PoS hardware items, including:-
 - Touch screen
 - Magnetic stripe reader
 - Keyboard
 - Barcode reader
 - Counter printer
 - A4 printer
 - PIN Pad
 - Network hub for branches with more than 2 counters
 - Electronic scales
18. All CTO branches will be connected by LAN through the single branch router to the live data centre i.e. through the standard network connections. Mobile training offices will work within similar constraints to the live mobile solution (including regularly being left online overnight in order to receive software updates).
19. The speed of response for transactions must be broadly equivalent to the response time of the live environment
20. The physical security of the CTO branches must be equivalent to the security of a normal branch - the CTO will share the same network and physical infrastructure as normal branches
21. Mobile CTO branches will have a permanent home location where they will be initially set up and connected periodically when not being used for off-site training events. For example where they can receive software and reference data updates overnight, or initialised in advance of a training session

22. CTO branches must be supported though the standard break-fix service
23. CTO's will not be treated any differently from normal branches in service monitoring reports
24. CTO branches will be opened, updated and closed using the BAU OBC process
25. Mobile CTO branches are subject to the standard OBC rules regarding temporary closure if they are to be left disconnected for long periods of time

Classroom Training

26. Something about pre-set data
27. Something about re-set of data
28. Training data is retained until a trainer performs a data reset. A reset is required 28 days after the last reset. After this period, trainees are prevented from logging in successfully until a reset has been performed

Process Flows

Business Collateral

Technical Specification

28.1 On-line Interfaces

28.1.1 Emulators

For all transaction that do not require a call to a third party application the CTO branch will respond as live,

Where transactions require a call to a third party application as part of the transaction flow, the simulated response must be provided by emulators at the data centre. This allows the transactions to be completed as part of the classroom training.

This is a high level overview of the product types, set up data and user ID's and passwords needed to be part of the FOA emulated responses. The HNG CTO Emulated Responses document

was used as the basis for this list and has been reviewed to remove any obsolete transactions.

An FOA emulator response document will be provided with the specific details of each emulated transaction response required for the classroom training.

Transaction Product List

- Debit Card - used to make payments and to do online banking
- POca - Used to complete all PO card account transactions
- Postal Orders - Sell and encash
- DVLA - a number of different scenarios to cover all DVLA work
- Moneygram - Send and Receive transactions
- Telephony - Expression of interest and a sale
- Travel Insurance - Getting a quote
- Remittance Barcodes - any valid stock pouch will be checked
- Payout letter (this replaces the NS&I withdrawal transaction currently available on the HOL emulator)
- Mobile phone top-ups - using swipe card or just system generated activation code
- Post Office Bank Account - Post Office Current Account opening and servicing of account

Transactions not currently available but we may like to consider:

- Drop & Go - Balance, top up of account and count mail

28.1.2 Pre-set training data

CTO set up data

As well as transaction information the current emulator provides a set starting position for Stock BB and the CTO can be refreshed at the end of each course to reset the stock position

- Initial Stock in stock unit BB

Additional Stock units set up:

- CA1 - for Camelot Transactions

The Stock Unit will be shared and not have any opening stock balances

28.1.3 User management

User ID's and passwords

The emulator also has 2 users set up on the system - the user ID's and passwords are the same in every CTO and the password does not need to be reset when the user first logs on. Passwords do not expire for 30 days after the CTO branch is

reset. Both users will be attached to DEF stick unit.

28.2 Reference Data

28.3 Other technical considerations

DRAID

28.4 Decisions

28.5 Risks

28.6 Actions

28.7 Issues

28.8 Dependencies

- User management – specific training profiles need to be created for use on the Counter Training Office system.

Assumptions

- User ID's for Post Office trainers will be set up centrally
- All branch user ID's will be controlled by the local trainer
- When the training data is reset before each training course, the users ID's will still be available and the password will be reset back to the known password
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