

OWNER: CUST-DEV2	ISSUE DATE: 13/12/2010	VERSION: 1.01
<p>TAXATION AND CUSTOMS UNION DG</p> <p>SUBJECT:</p> <p>DLV-0.1-1_Progress Measurement and Monitoring</p>		
<p>CUST-DEV2 [REMOVED]</p>		

CUST-DEV2	REF: [REMOVED]
PROGRESS MEASUREMENT AND MONITORING	
DOCUMENT HISTORY	

DOCUMENT HISTORY

Version	Date	Description	Action (*)	Pages
0.02	13/08/2010	Submitted for Information	I	All
0.03	09/09/2010	Submitted for Review	/	All
0.11	19/09/2010	Internal Review after Implementation of review comments	R	All
0.12	25/10/2010	Submitted for Information		
0.13	04/11/2010	Internal Review	I/R	All
1.00	15/11/2010	Submitted for Acceptance		
1.01	13/12/2010	Re-Submitted for Acceptance		

(*) Action: I = Insert R = Replace

CUST-DEV2	REF: [REMOVED]
PROGRESS MEASUREMENT AND MONITORING	
TABLE OF CONTENTS	

TABLE OF CONTENTS

DOCUMENT HISTORY	2
TABLE OF CONTENTS	3
LIST OF TABLES	4
TABLE OF FIGURES	5
1 INTRODUCTION	6
1.1 Scope	6
1.2 References	6
1.3 Acronyms and Abbreviations	6
2 PROCESS OVERVIEW	7
2.1 Process Goal	7
2.2 Progress Measurement and Monitoring Boundaries	7
3 ROLES AND RESPONSIBILITIES	8
3.1 Roles	8
4 PROGRESS MEASUREMENT AND MONITORING	9
4.1 Trigger Event	9
4.2 Procedure Input	9
4.3 Procedure Flow	10
4.4 The Procedure	11
4.5 Output	14
4.6 Exit Criteria	14

CUST-DEV2	REF: [REMOVED]
PROGRESS MEASUREMENT AND MONITORING	
LIST OF TABLES	

LIST OF TABLES

Table 1-1: Reference documents	6
Table 1-2: Acronyms and Abbreviations	6
Table 3-1: Roles and Responsibilities.	8
Table 4-1: Progress Measurement and Monitoring Procedure	13

CUST-DEV2	REF: [REMOVED]
PROGRESS MEASUREMENT AND MONITORING	
TABLE OF FIGURES	

TABLE OF FIGURES

Figure 4-1: Progress Measurement and Monitoring Procedure Flow 10

CUST-DEV2	REF: DLV-0.1-1-ANNEX 04
PROGRESS MEASUREMENT AND MONITORING	
INTRODUCTION	

1 INTRODUCTION

1.1 Scope

This document focuses on the activities that are undertaken to measure and monitor the progress of the CUST-DEV2 project.

1.2 References

RD#	Title	Originator	Version	Date
[RD1]	TEMPO - Glossary of Terms (tmp-gen-gls)	DG TAXUD/R4	2.04-EN	01/08/2007
[RD2]	TEMPO - Project Monitoring and Control Technique (tmp-tec-pmc)	DG TAXUD/R4	Version 1.10-EN	10/02/2009
[RD3]	Framework Quality Plan	CUST-DEV2	00.01.00	

Table 1-1: Reference documents

1.3 Acronyms and Abbreviations

See Annex 19 for the full list of Acronyms and Abbreviations. These below are the relevant abbreviations for the Progress Measurement and Monitoring.

ACRONYM OR ABBREVIATION	DEFINITION
DG TAXUD	Directorate General - Taxation and Customs Union
DTM	Deliverable Tracking Matrix
MPR	Monthly Progress Report
MSR	Monthly Service Report

Table 1-2: Acronyms and Abbreviations

CUST-DEV2	REF: [REMOVED]
PROGRESS MEASUREMENT AND MONITORING	
PROCESS OVERVIEW	

2 PROCESS OVERVIEW

2.1 Process Goal

This document outlines the activities that need to be performed to monitor so that potential problems can be identified in a timely manner and corrective actions can be taken to control the execution of the project. The purpose of this technique is to:

- Collect the correct information related to the project progress and transmit it efficiently to DG TAXUD;
- Provide information on the quality of service and the effectiveness of the project.

2.2 Progress Measurement and Monitoring Boundaries

Progress Measurement and Monitoring includes:

- Creating and submitting on a weekly basis:
 - Deliverables Tracking Matrix (DTM);
 - Consumption Sheet;
- Creating and submitting on a monthly basis:
 - Monthly Progress Report (MPR);
 - Monthly Service Report (MSR).

CUST-DEV2	REF: [REMOVED]
PROGRESS MEASUREMENT AND MONITORING	
ROLES AND RESPONSIBILITIES	

3 ROLES AND RESPONSIBILITIES

3.1 Roles

Role	Responsibility
CUST-DEV2 Project Management Office (PMO)	<p>The CUST-DEV2 PMO is responsible for:</p> <ul style="list-style-type: none"> Collecting all required input from the CUST-DEV2 Project Managers; Preparing the DTM, Consumption Sheet and MPR.
CUST-DEV2 Project Managers	<p>The CUST-DEV2 Project Managers are responsible for:</p> <ul style="list-style-type: none"> Providing required input to the CUST-DEV2 PMO.
CUST-DEV2 Contract Management	<p>The CUST-DEV2 Contract Management is responsible for:</p> <ul style="list-style-type: none"> Finalising and submitting the DTM, Consumption Sheet and MPR.

Table 3-1: Roles and Responsibilities.

CUST-DEV2	REF: [REMOVED]
PROGRESS MEASUREMENT AND MONITORING	
PROGRESS MEASUREMENT AND MONITORING	

4 PROGRESS MEASUREMENT AND MONITORING

4.1 Trigger Event

The progress on the fixed price activities under the SC and the QTM activities is reported on a weekly basis by the project managers to the CUST-DEV2 Project Management Team. Based on this information the Project Management Team will maintain the planning and the DTM. The slippages are reported in the DTM for the actual dates for SfR and SfA.

The updated DTM is sent to DG TAXUD every week, even if it has no updates, according to the Communication Procedures described in section 4.3.4.8 of the FQP [RD3]. This allows DG TAXUD to monitor the progress of the different activities. The DTM can be altered within a week when at least one of the following events occurs:

- SfR for any deliverable;
- Reception of review comments on any deliverable;
- SfA for any deliverable;
- Reception of an acceptance letter;
- New foreseen date for SfR;
- New foreseen date for SfA;
- When a starting date (T_0) is defined by the actual SfA date of another deliverable;
- Reception of a QTM Action or RfA.

The planning Gantt chart is updated as needed and delivered every month to DG TAXUD along with the MPR.

In addition, every person who identifies a risk of overrun or of slippage must raise, at any time, a warning to the Project Manager who creates a new entry in the risk register. The latter is delivered to DG TAXUD along with the MPR.

The incident report list is provided in the MPR.

4.2 Procedure Input

The input for this procedure consists of the minutes from the CUST-DEV2 internal weekly status meetings and specific information provided by the CUST-DEV2 Project Managers.

4.3 Procedure Flow

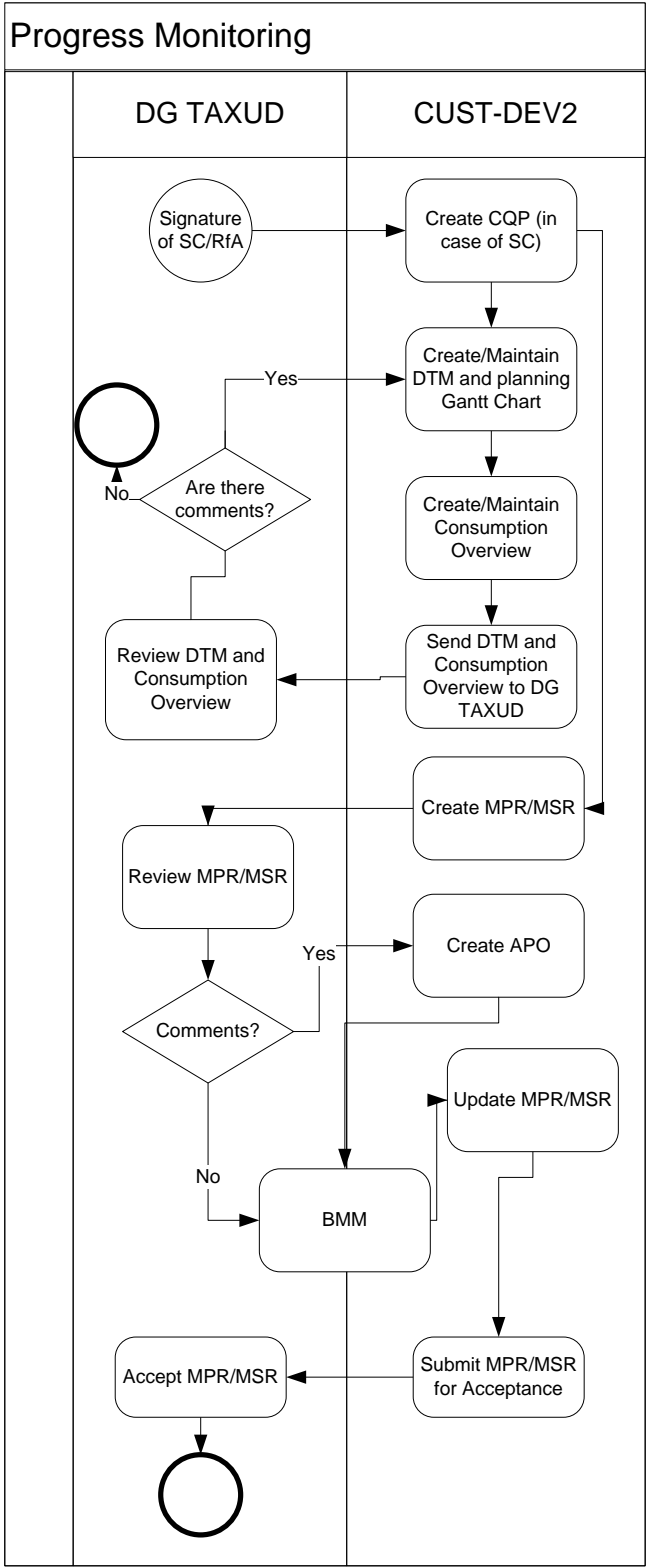


Figure 4-1: Progress Measurement and Monitoring Procedure Flow

CUST-DEV2	REF: [REMOVED]
PROGRESS MEASUREMENT AND MONITORING	
PROGRESS MEASUREMENT AND MONITORING	

4.4 The Procedure

Step	Progress Monitoring
1	Create CQP (in case of SC)
Input	Signed Specific Contract
Description	After the signature of the Specific Contract, CUST-DEV2 creates a CQP that includes potential modifications to how the progress on the Specific Contract is monitored.
Output	DLV-0.3-1 : CQP
2	Create/Maintain DTM and Planning Gantt chart
Input	<ul style="list-style-type: none"> Signed Specific Contract; DLV-0.3-1 : CQP; RfA : QTM.
Description	<p>The DTM and the Planning Gantt Chart is created based on the deliverables that have to be created for the Specific Contract (Fixed Price). The DTM for QTM activities will be created upon reception of the RfA.</p> <p>Maintenance of the DTM and the Planning Gantt is done based on the input received from the Project Managers during the internal CUST-DEV2 status reporting.</p>
Output	DLV-0.8-1: DTM and planning Gant chart. They will also be added as annex to the MPR.
3	Create Consumption Overview
Input	<ul style="list-style-type: none"> Signed Specific Contract; RfA for On Demand activities.
Description	Create and maintain a Consumption overview for this Specific Contract. Follow the Consumption Tracking procedure to do this.
Output	Consumption Sheet, will be also added as annex to the MPR
4a	Send DTM and Consumption Sheet to DG TAXUD (weekly)
Input	<ul style="list-style-type: none"> DTM; Consumption Overview.

CUST-DEV2	REF: [REMOVED]
PROGRESS MEASUREMENT AND MONITORING	
PROGRESS MEASUREMENT AND MONITORING	

Description	CUST-DEV2 sends the DTM and Consumption Sheet to DG TAXUD, QAC and ITSM on a weekly basis. Furthermore, CUST-DEV2 will warn DG TAXUD when 75% of the released quantities for consumption have been consumed. When more quantities are needed, DG TAXUD will order these via the RfA mechanism and CUST-DEV2 will produce a proposal under WP.0.4
Output	<ul style="list-style-type: none"> DTM; Consumption Overview.
4b	DG TAXUD reviews the DTM and the Consumption Sheet
Input	<ul style="list-style-type: none"> DTM; Consumption Sheet.
Description	DG TAXUD reviews the DTM and the Consumption Sheet and sends an email to confirm that there are no comments or an email with the comments.
Output	Email sent by DG TAXUD to CUST-DEV2
5a	Create MPR
Input	<ul style="list-style-type: none"> Specific Contract; Team Status Reports : CUST-DEV2 internal report; DTM; Consumption Overview.
Description	CUST-DEV2 creates the MPR at the beginning of the month for the previous month and sends it to DG TAXUD for Review
Output	DLV-0.7-1 : MPR Submitted for Review
5b	Create MSR
Input	<ul style="list-style-type: none"> Specific Contract; Team Status Reports; Incident and Problem data.
Description	CUST-DEV2 creates the MSR at the beginning of the month for the previous month and sends it to DG TAXUD for Review
Output	MSR Submitted for Review as annex of the MPR
5c	Review of the MPR with Annexes by DG TAXUD
Input	DLV-0.7-1 : MPR and Annexes
Description	DG TAXUD reviews the MPR and annexes and completes the review database.
Output	The review database completed with the review comments.

CUST-DEV2	REF: [REMOVED]
PROGRESS MEASUREMENT AND MONITORING	
PROGRESS MEASUREMENT AND MONITORING	

5d	Author's positions on review comments of DG TAXUD
Input	Tempo review database
Description	CUST-DEV2 creates the author's position on the comments submitted by DG TAXUD.
Output	The TEMPO review database completed with the author's positions.
6	BMM
Input	DLV-0.7-1 : MPR
Description	CUST-DEV2 presents the MPR on the Bilateral Monthly Meeting (BMM).
Output	DLV-0.6-4.1 : Minutes of the BMM
7a	Update MPR
Input	<ul style="list-style-type: none"> DLV-0.7-1 MPR.
Description	CUST-DEV2 updates the MPR with the final decisions from the BMM
Output	DLV-0.7-1 : MPR submitted for acceptance
7b	Update MSR
Input	<ul style="list-style-type: none"> DLV-0.7-1 : MSR; Review database; DLV-0.6-4-1 : BMM minutes.
Description	CUST-DEV2 updates the MSR with the final decisions from the BMM
Output	DLV-0.7-1 : MPR SfA version with annexes
8	Submit MPR and MSR for Acceptance
Input	DLV-0.7-1 : MPR SfA version with annexes
Description	CUST-DEV2 submits the updated MPR and MSR for Acceptance to DG TAXUD.
Output	/

Table 4-1: Progress Measurement and Monitoring Procedure

CUST-DEV2	REF: [REMOVED]
PROGRESS MEASUREMENT AND MONITORING	
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4.5 Output

The procedure produces the following outputs:

- Monthly Progress Report;
- Monthly Service Report;
- Deliverable Tracking Matrix;
- Consumption Sheet.

4.6 Exit Criteria

The exit criteria for the Progress Monitoring Procedure are:

- Accepted Deliverable Tracking Matrix;
- Accepted Consumption Sheet;
- Accepted Monthly Progress Report.