

<b>PROCEDURE</b>	<b>REF: [REMOVED]DLV-0.1-1-ANNEX 42</b>
<b>TECHNICAL MEETING REQUEST</b>	

<b>OWNER:</b> <b>CUST-DEV2</b>	<b>ISSUE DATE:</b> <b>13/07/2011</b>	<b>VERSION:</b> <b>1.00</b>
<p><b>TAXATION AND CUSTOMS UNION DG</b></p> <p><b>SUBJECT:</b></p> <p><b>DLV-0.1-1_TECHNICAL MEETING REQUEST</b></p>		
<p><b>CUST-DEV2</b></p> <p><b>[REMOVED]</b></p>		

<b>PROCEDURE</b>	<b>REF: [REMOVED]</b>
<b>TECHNICAL MEETING REQUEST</b>	
<b>DOCUMENT HISTORY</b>	

## DOCUMENT HISTORY

<b>Version</b>	<b>Date</b>	<b>Description</b>	<b>Action (*)</b>	<b>Pages</b>
0.01	27/05/2011	Creation	I	All
0.02	06/06/2011	Internal Review	R	All
0.10	29/06/2011	Submitted for Review		
1.00	13/07/2011	Implemented comments and Submitted for Acceptance to DG TAXUD	I/R	All

(\*) Action: I = Insert R = Replace

PROCEDURE	REF: [REMOVED]
TECHNICAL MEETING REQUEST	
TABLE OF CONTENTS	

## TABLE OF CONTENTS

1	INTRODUCTION	6
1.1	Document Purpose	6
1.2	Scope	6
1.3	References	6
1.4	Acronyms and Abbreviations	6
2	PROCESS OVERVIEW	7
2.1	Process Goal	7
2.2	Technical Meeting Request Boundaries	7
3	ROLES AND RESPONSIBILITIES	8
3.1	Roles	8
4	TECHNICAL MEETING REQUEST	9
4.1	Trigger Event	9
4.2	Procedure Input	9
4.3	Technical Meeting Request Registration	10
4.4	Technical Meeting Request Process	10

PROCEDURE	REF: [REMOVED]
TECHNICAL MEETING REQUEST	
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: Technical Meeting Request Process ..... 13

PROCEDURE	REF: [REMOVED]
TECHNICAL MEETING REQUEST	
TABLE OF FIGURES	

# TABLE OF FIGURES

Figure 4-1: Technical Meeting Request..... 10

Figure 4-2: Technical Meeting Request excel sheet ..... 13

Figure 4-3: Technical Meeting Request e-mail..... 13

<b>PROCEDURE</b>	<b>REF: [REMOVED]</b>
<b>TECHNICAL MEETING REQUEST</b>	
<b>INTRODUCTION</b>	

# 1 INTRODUCTION

## 1.1 Document Purpose

The purpose of the document is to describe how CUST-DEV2 will handle Technical Meeting requests.

## 1.2 Scope

This document is applicable to all CUST-DEV2 Technical Meeting requests.

## 1.3 References

<b>RD#</b>	<b>Title</b>	<b>Originator</b>	<b>Version</b>	<b>Date</b>
[RD1]	Framework Quality Plan	CUST-DEV2	1.01	
[RD2]	Specific Contract Management Reference Manual (TMP-REF-MSC)	DG TAXUD	2.50	17/09/2010

Table 1-1: Reference documents

## 1.4 Acronyms and Abbreviations

<b>ACRONYM OR ABBREVIATION</b>	<b>DEFINITION</b>
CS	Consumption Sheet
DG TAXUD	Directorate General - Taxation and Customs Union
DTM	Deliverables Tracking Matrix
KT	Knowledge Transfer
RfA	Request for Action

Table 1-2: Acronyms and Abbreviations

PROCEDURE	REF: [REMOVED]
TECHNICAL MEETING REQUEST	
PROCESS OVERVIEW	

## 2 PROCESS OVERVIEW

### 2.1 Process Goal

Technical Meeting Request is the process to get the authorization from DG TAXUD to participate to Technical Meetings.

### 2.2 Technical Meeting Request Boundaries

A Technical Meeting Request, from a CUST-DEV2 perspective, includes:

- Creating the Technical Meeting Request excel sheet;
- Creating Technical Meeting authorisation request;
- Deliverables Tracking Matrix update;
- Consumption Sheet update.

A technical meeting is not always initiated by a request from CUST-DEV2.

A technical meeting can also be requested by DG TAXUD.

CUST-DEV2 can receive in the CUST-DEV2 mailbox from DG TAXUD an e-mail or a meeting invite with the request to attend a technical meeting.

All steps where CUST-DEV2 makes the request will be skipped in that case.

A Technical Meeting Request excludes:

- Other requests.

PROCEDURE	REF: [REMOVED]
TECHNICAL MEETING REQUEST	
ROLES AND RESPONSIBILITIES	

### 3 ROLES AND RESPONSIBILITIES

#### 3.1 Roles

ROLE	RESPONSIBILITY
Project Manager	Initiate the request and send input for the request to CUST-DEV2 PMO.
CUST-DEV2 PMO Team	<p>The PMO Team is responsible for:</p> <ul style="list-style-type: none"> <li>• Creating the Technical Meeting request excel sheet;</li> <li>• Creating the Technical Meeting authorisation request e-mail regarding the Technical Meeting session(s), workshops or demonstration;</li> <li>• Sending the Technical Meeting authorisation request to DG TAXUD;</li> <li>• Register the technical meeting in the DTM and the Consumption Sheet.</li> </ul>
DG TAXUD	<p>DG TAXUD is responsible for</p> <ul style="list-style-type: none"> <li>• sending a confirmation e-mail about the Request. This e-mail approves or refuse the Request;</li> <li>• request the attendance to a technical meeting (email or meeting invite).</li> </ul>

Table 3-1: Roles and Responsibilities.



PROCEDURE	REF: [REMOVED]
TECHNICAL MEETING REQUEST	
TECHNICAL MEETING REQUEST	

## 4 TECHNICAL MEETING REQUEST

CUST-DEV2's role within the Technical Meeting Request process will be to

- Create the Technical Meeting Request excel sheet;
- Create the Authorisation request regarding training, workshop or demonstration sessions e-mail;
- Send the authorisation request to DG TAXUD.

Next to sending the Technical Meeting Request to DG TAXUD, CUST-DEV2 will also **register** the Technical Meeting requested units in the Consumption Sheet and will update the DTM with the deliverables to be produced.

### 4.1 Trigger Event

When a technical meeting is needed, the formal authorisation request procedure will be followed. The Technical Meeting request process must be completed the latest 48 hours before the start of the Technical Meeting.

If there is no existing RfA to cover the request, the formal request for action (RfA) procedure as defined in TEMPO will be followed.

DG TAXUD will assume its role as Authorization Authority to prepare and submit the Requests for Action (RfA) to CUST-DEV2 contractor.

When the technical meeting is requested by DG TAXUD no request is initiated by CUST-DEV2. CUST-DEV2 goes directly to the step of registration of the technical meeting (Section 4.3).

### 4.2 Procedure Input

The input for the Technical Meeting request process is providing the Technical Meeting Request excel sheet (see Figure 4-2) with the following information:

- The Specific Contract reference;
- Work Package reference;
- RfA reference;
- Total number of released units;
- The number of Technical Meeting units required, consumed and remaining per RfA;
- The Technical Meetings included in this request;
- The Technical Meeting location;
- The Technical Meeting start and end dates;
- The list of participants.

PROCEDURE	REF: [REMOVED]
TECHNICAL MEETING REQUEST	
TECHNICAL MEETING REQUEST	

### 4.3 Technical Meeting Request Registration

When the Technical Meeting Request is accepted, CUST-DEV2 PMO team will register the Technical Meeting requested units in the CS and will update the DTM with the deliverables to be produced.

### 4.4 Technical Meeting Request Process

#### 4.4.1 The Flow

CUST-DEV2's Technical Meeting Request process is illustrated in Figure 4-1.

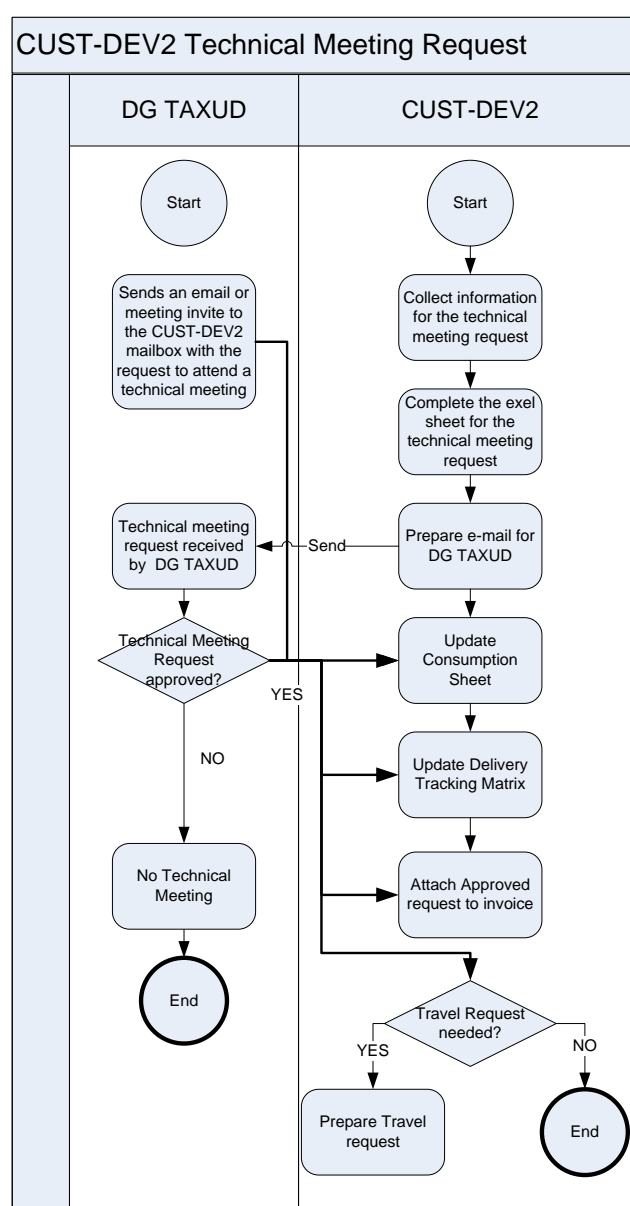


Figure 4-1: Technical Meeting Request

<b>PROCEDURE</b>	<b>REF: [REMOVED]</b>
<b>TECHNICAL MEETING REQUEST</b>	
<b>TECHNICAL MEETING REQUEST</b>	

#### 4.4.2 The Procedure

The Technical Meeting Request activities are described in Table 4-1.

<b>Step</b>	<b>Description</b>
1. Start of the process	Trigger event
INPUT	<ul style="list-style-type: none"> <li>An e-mail received in the CUST-DEV2 mailbox from DG TAXUD within the subject a clear reference that CUST-DEV2 is requested to attend a technical meeting.</li> <li>A meeting invite received in the CUST-DEV2 mailbox from DG TAXUD within the subject a clear reference that is concerns a technical meeting.</li> </ul> <p>With these inputs the process skips the following steps and goes directly to the step 7 “update consumption sheet”.</p>
2. Collect information for the Technical Meeting Request	CUST-DEV2’s PMO team will collect the input information from the Project Manager.
INPUT	Information received from the Project Manager.
OUTPUT	<ul style="list-style-type: none"> <li>The Specific Contract reference;</li> <li>Work Package reference;</li> <li>RfA reference;</li> <li>The number of Technical Meeting units required, consumed and remaining per RfA;</li> <li>The Technical Meeting sessions included in this request;</li> <li>The Technical Meeting location;</li> <li>The Technical Meeting start and end dates;</li> <li>The list of participant.</li> </ul>
3. Complete the excel sheet for the Technical Meeting request	With the information collected, CUST-DEV2’s PMO team will create the Technical Meeting Request excel sheet.
INPUT	Technical Meeting Request excel sheet (Figure 4-2).
OUTPUT	Technical Meeting Request excel sheet completed.
4. Prepare the e-mail for DG TAXUD	CUST-DEV2’s PMO team will send an e-mail to the DG TAXUD (sector concerned with copies to the DG TAXUD functional mailbox and supply management process responsible) for RfA creation with the Technical Meeting Request excel sheet

<b>PROCEDURE</b>	<b>REF: [REMOVED]</b>
<b>TECHNICAL MEETING REQUEST</b>	
<b>TECHNICAL MEETING REQUEST</b>	

Step	Description
	attached. (Figure 4-3)
INPUT	Technical Meeting Request excel sheet completed.
OUTPUT	Send the e-mail to DG TAXUD (sector concerned with copies to functional mailbox and supply management process responsible).
5. Technical Meeting request received by DG TAXUD	When DG TAXUD will process the e-mail, they can <ul style="list-style-type: none"> <li>• Authorise the request;</li> <li>• Reject the request.</li> </ul>
INPUT	E-mail sent by CUST-DEV2's PMO Team.
OUTPUT	Send e-mail to CUST-DEV2's with approval or rejection.
6. No Technical Meeting Reimbursement	If the request is not authorised, the Technical Meeting sessions will not be performed and units will not be consumed.
INPUT	Received e-mail in response to the Technical Meeting request from DG TAXUD.
OUTPUT	None.
7. Update Consumption Sheet	If the request is authorised, CUST-DEV2's PMO team will register the requested units in the Consumption Sheet.
INPUT	Received authorisation e-mail in response to the Technical Meeting request from DG TAXUD.
OUTPUT	Consumption sheet updated.
8. Update Deliverables Matrix	If the request is authorised, CUST-DEV2's PMO team will update the Deliverables Tracking Matrix.
INPUT	<ul style="list-style-type: none"> <li>• Received authorisation e-mail in response to the Technical Meeting request from DG TAXUD.</li> <li>• E-mail or meeting invite from DG TAXUD (step 1)</li> </ul>
OUTPUT	DTM updated
9. Attach RFA to invoice	If the RfA is received, CUST-DEV2's PMO team will attach a copy of the RFA to the invoice.
INPUT	Received authorisation e-mail in response to the Technical Meeting request from DG TAXUD.

<b>PROCEDURE</b>	<b>REF: [REMOVED]</b>
<b>TECHNICAL MEETING REQUEST</b>	
<b>TECHNICAL MEETING REQUEST</b>	

<b>Step</b>	<b>Description</b>
OUTPUT	Invoice with attached RFA from DG TAXUD (invoicing will be made only for the consumed and approved RfA units);  Consumption Sheet updated.
10. Prepare Travel Request	If travel is needed to attend the Technical Meeting, CUST-DEV2's PMO team will prepare the Travel Request.
INPUT	Received authorisation e-mail in response to the Technical Meeting request from DG TAXUD.
OUTPUT	CUD2-FC-DLV-0.1-1-Annex 22-Technical Meeting Request

Table 4-1: Technical Meeting Request Process

#### **4.4.3 Technical Meeting Request excel sheet Sample**

[Picture]

Figure 4-2: Technical Meeting Request excel sheet

#### **4.4.4 Technical Meeting Request e-mail Sample**

[Picture]

Figure 4-3: Technical Meeting Request e-mail