

OWNER: DG TAXUD	ISSUE DATE: 22/03/2010	VERSION: 1.04
<p>TAXATION AND CUSTOMS UNION DG ITSM</p> <p>SUBJECT:</p> <p>FQP - Annex 14: Configuration Management</p> <p><input type="checkbox"/> STYLEREF CONTRACT # TAXUD/2007/CC/088</p>		
FRAMEWORK CONTRACT # TAXUD/2007/CC/088		

ITSM	REF.: ITS-IFQP-SC04
FQP - Annex 14: Configuration Management	VER.: 1.04
Document History	ISSUE DATE: 22/03/2010

Document History

Edi.	Rev.	Date	Description	Action (*)	Pages
0	01	06/07/2007	First Draft	I	All
0	02	05/10/2007	Further implementation	I/R	As req.
0	03	08/10/2007	Further implementation	I/R	As req.
0	04	15/10/2007	Draft delivered for information to DG TAXUD	I/R	As req.
0	05	31/10/2007	Draft delivered for information to DG TAXUD	I/R	As req.
0	06	30/11/2007	Further implementation + Implementation of comments received from DG TAXUD. Delivered for information to DG TAXUD	I/R	As req.
0	07	10/12/2007	Further updates	I/R	As req.
0	08	01/04/2008	Further updates	I/R	As req.
0	09	07/07/2008	Consolidation after intermediate deliveries of processes outside of the scope of the FQP document	I/R	As req.
0	10	15/07/2008	Delivered for review to DG TAXUD after internal QC	I/R	As req.
1	00	07/11/2008	Delivered for acceptance to DG TAXUD after implementation of review comments	I/R	As req.
1	01	28/11/2008	Re-delivered for acceptance to DG TAXUD after implementation of remaining comments	I/R	As req.
1	01-2	05/10/2009	First evolutive version	I/R	As req.
1	01-3	17/10/2009	Further updates	I/R	As req.
1	01-4	07/11/2009	Further updates	I/R	As req.
1	01-5	24/11/2009	Further updates	I/R	As req.
1	01-6	01/12/2009	Further updates	I/R	As req.
1	01-7	08/12/2009	Sent for internal review and implementation of QC comments	I/R	As req.
1	01-8	10/12/2009	Sent for information to DG TAXUD	I	As req.
1	01-9	01/15/2010	Further update	I	As req.

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1	01/10	19/01/2010	Further update	I	As req.
1	02	01/02/2010	Delivered for review to DG TAXUD after internal QC	I/R	As req.
1	03	05/02/2010	Re-delivered for review to DG TAXUD after internal QC	I/R	As req.
1	04	22/03/2010	Delivered for acceptance to DG TAXUD	I/R	As req.

(*) Action: I = Insert R = Replace

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1. Introduction

This document is an annex to the Framework Quality Plan, deliverable DLV 0.1.1 requested in Specific Contract 04 [A2] under Framework Contract (IT Service Management for DG Taxation and Customs Union) [A1], Work Package WP.0.1.

This document presents the Level 1, 2 and 3 of the ITSM process FQP - Annex 14: Configuration Management.

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2 - Reference and Applicable Documents	ISSUE DATE: 22/03/2010

2. Reference and Applicable Documents

This chapter presents two lists of relevant programme related documents. They are divided into reference and applicable documents.

2.1 Reference Documents

Id	Reference	Title	Date	Version
R1	ITS-IFQP-SC04-Framework Quality Plan	Framework Quality Plan	22/03/2010	1.04
R2	ITS-IFQP-SC04-Annex 9	ITSM Glossary	22/03/2010	1.13

Table 1 – Reference documents

2.2 Applicable Documents

An applicable document is a document which content is binding for a contractor no matter what is mentioned in this FQP.

Id	Reference	Title	Date	Version
A1	TAXUD/2007/CC/088	Framework Contract	04/05/2007	N/A
A2	TAXUD/2008/DE/114	Specific Contract 04	30/06/2008	N/A
A3	QAC-SC01-FQP_TEM	Framework Quality Plan Template	N/A	1.01

Table 2 – Applicable documents

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3 - Terminology	ISSUE DATE: 22/03/2010

3. Terminology

3.1 Abbreviations and Acronyms

A list of the abbreviations and acronyms used in the context of the ITSM Programme, and more specifically for this document is provided in Annex 9 ITSM Glossary [R2].

3.2 Interface with DG TAXUD

Where there is a non-specific reference to DG TAXUD, Directorate Generale Taxation and Customs Union DG or other similar descriptions, it means that the interface can be with any one of the following business threads of DG TAXUD:

- DG TAXUD A4/CPT;
- DG TAXUD A4/ISD;
- DG TAXUD A4/APM;
- DG TAXUD A3/Tax;
- DG TAXUD A3/Exc;
- DG TAXUD A3/CUST;
- DG TAXUD A3/LISO.

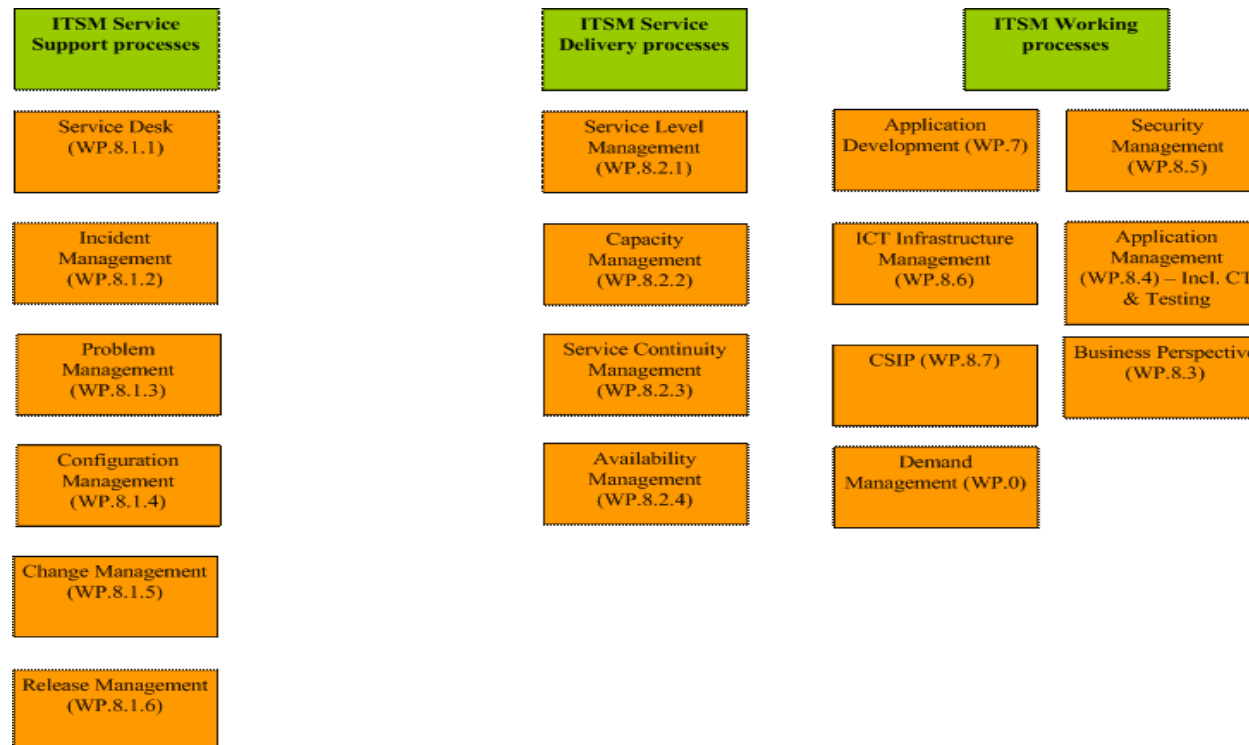
Where it is intended that a reference is to a specific business thread, one of the business threads above shall be stated.

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4. ITSM Process model

4.1 Level 0: Process flows



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Figure 4-1: ITSM Process Model

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4.2 Level 1: Configuration Management

Configuration Management is a process that tracks all individual Configuration Items (CI) in a system. The prime tool of Configuration Management is the Configuration Management Database (CMDB). The CMDB currently in use by ITSM is an open source application called OneCMDB. In future the embedded CMDB in the new SMT will be used. Configuration Items (CI) information can consist of the CIs and their attributes and relationships. CIs are managed and/or created both by XXX and by external parties: DG DIGIT and 3rd party developers. The Configuration Management process has a dependency on these external parties supplying CI information in a timely and consistent manner.

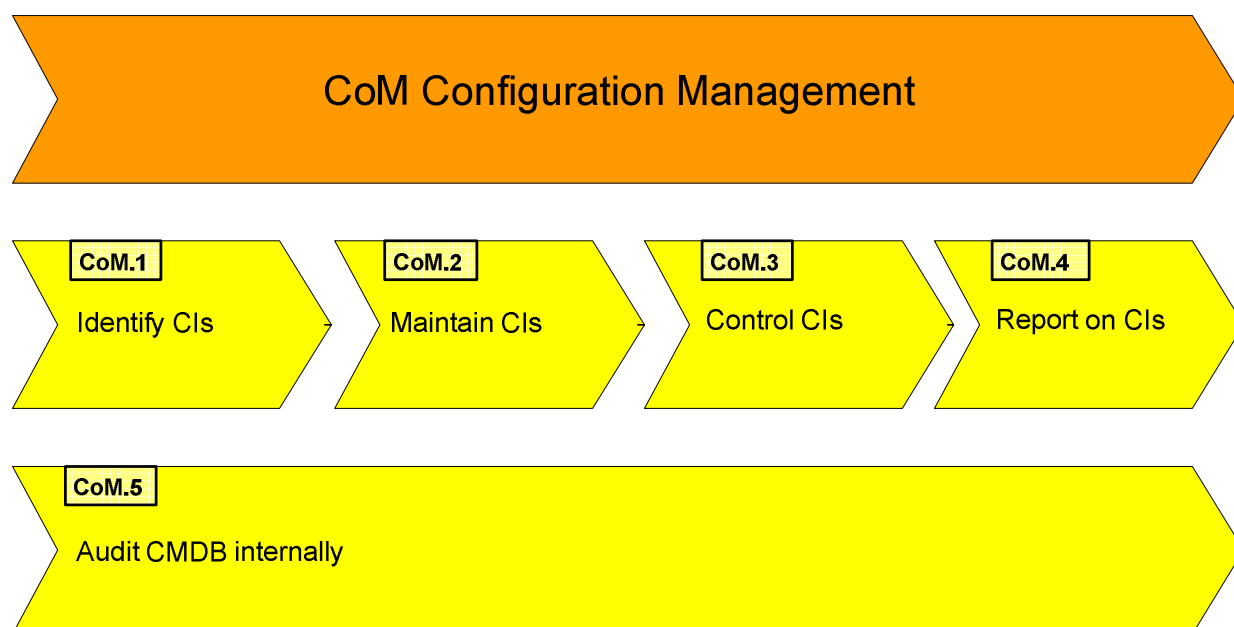


Figure 4-2: CoM Configuration Management sub-processes

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4.3 Level 2: Configuration Management

CoM.1 Identify CIs

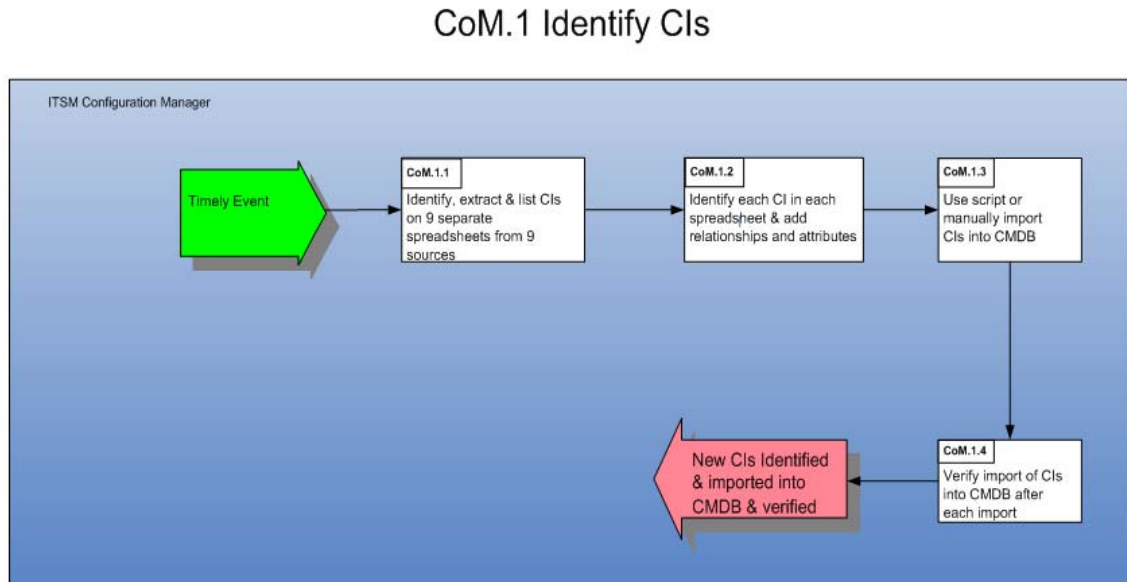


Figure 4-3: CoM.1 Identify CIs

The tool is able to identify 'new' CI's (not previously in its DB) as a standard/embedded feature and acts accordingly. It does not need a separate step 'New CI' input.

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CoM.2 Maintain CIs

There are 9 different sources and types of CIs that are referenced in the CMDB. These are:

- CIs (type 1): from Change Manager and RfCs;
- CIs (type 2): from Excise Change Manager;
- CIs (type 3): from DSL;
- CIs (type 4): Infrastructure/ COTS/Database from INFRA;
- CIs (type 5): Infrastructure/ COTS/Database from DIGIT;
- CIs (type 6): Users from MPR/MSR ex Security Management;
- CIs (type 7): NA Equipment Inventory;
- CIs (type 8): Documentation;
- CIs (type 9): NTA & NECA Information.

CoM.2 Maintain CIs

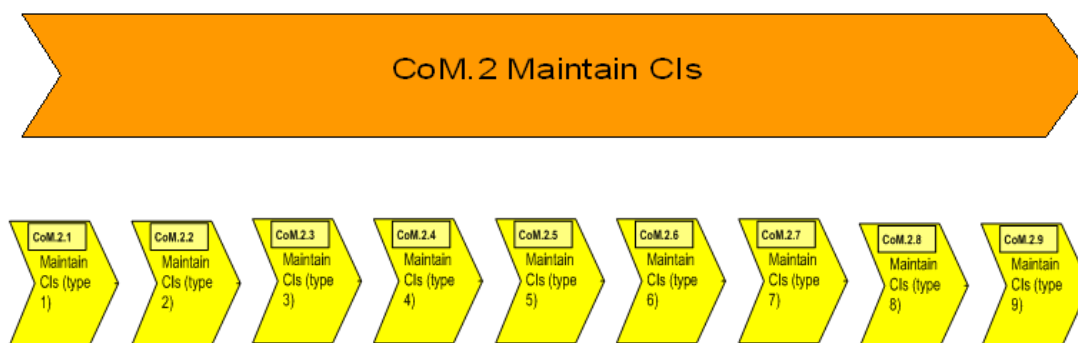


Figure 4-4: CoM.2 Maintain CIs

Figure 4-4 above shows that there are 9 separate ways of maintaining CIs in the CMDB. The way it is done is described in the sub-sections to CoM.2. The procedure is generic once information has been received from the source. The Level 2 diagram hereafter shows the generic procedure (which is the same for the 9 CI types) and the Level 3 details at a lower level how each of the 9 CI types is maintained.

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CoM.2 Maintain CIs

CoM.2 – Maintain CIs

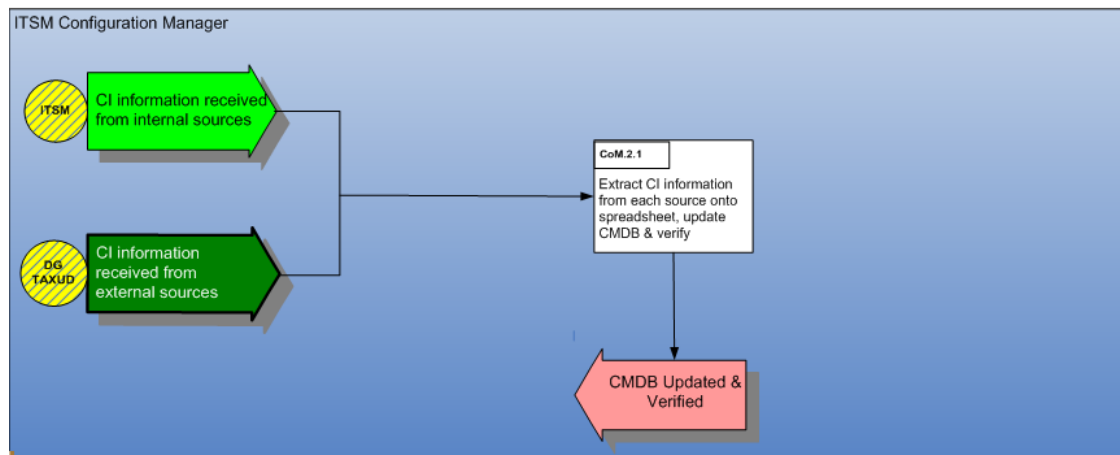


Figure 4-5: CoM.2.1 Maintain CIs (type 1)

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CoM.3 Control CIs

CoM.3 Control CIs

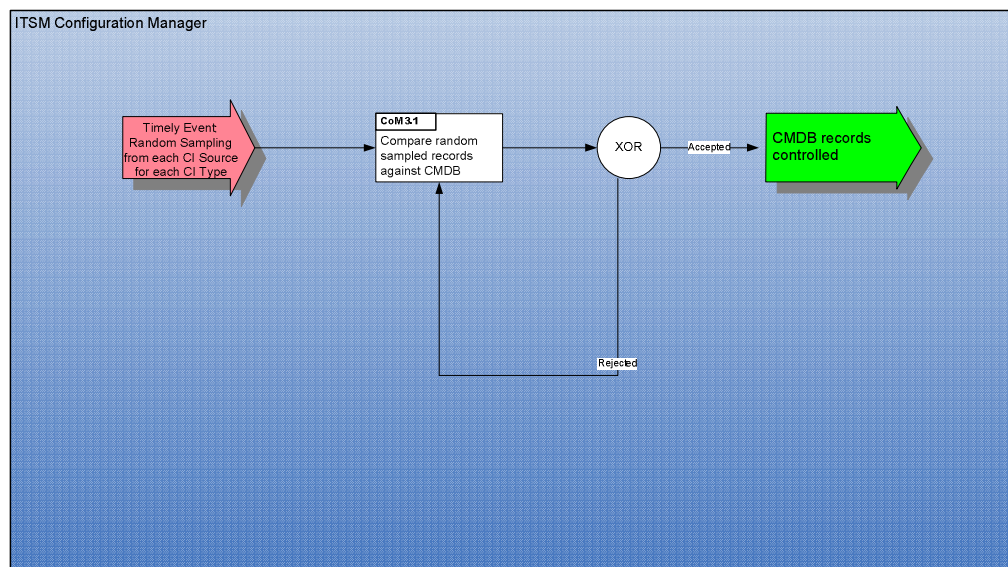


Figure 4-6: CoM.3 Control CIs

Note: Purpose is by sampling assess the current status/content of the CMDB.

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CoM.4 Report on CIs

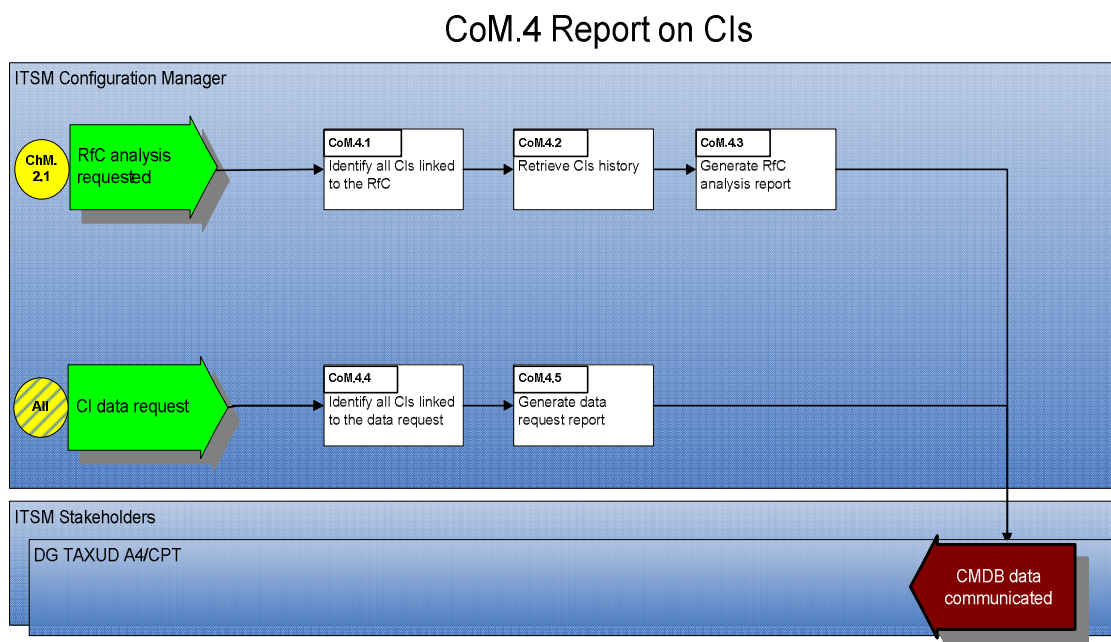


Figure 4-7: CoM.4 Report on CIs

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CoM.5 Audit CMDB internally

CoM.5 Audit CMDB internally

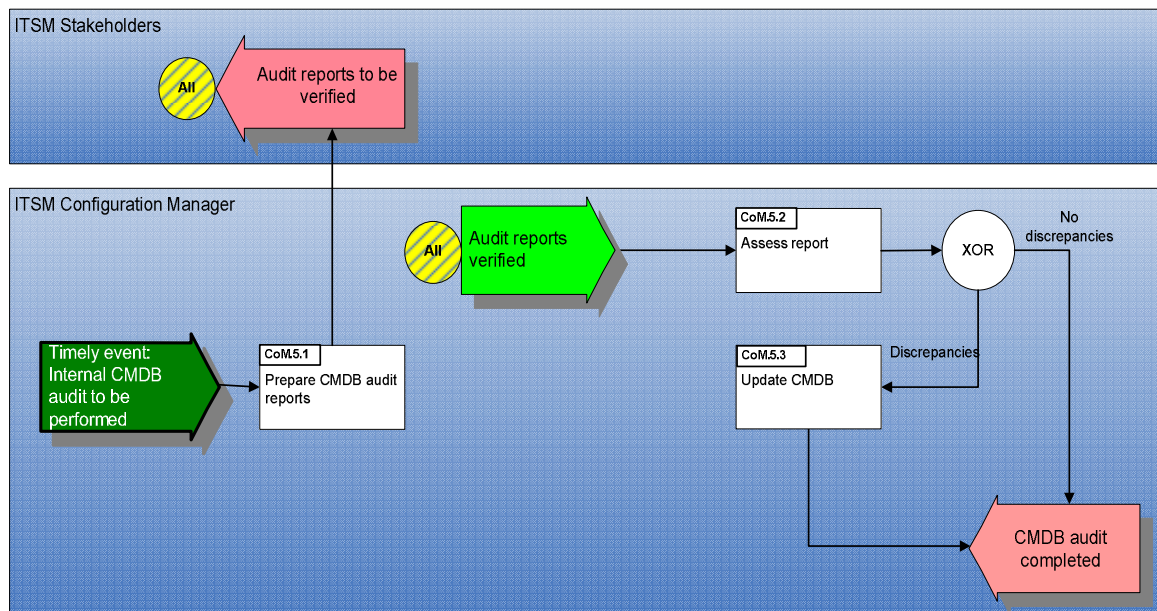


Figure 4-8: CoM.5 Audit CMDB

Note: Purpose of this activity is to assess the correctness and completeness of the CMDB by performing Audit-like validation on the content and its accuracy.

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RACI Table for CoM

Activity	ITSM Configuration Manager	ITSM Release Manager	ITSM Application Manager	ITSM Change Manager	ITSM Test Manager	ITSM Infrastructure Manager	ITSM Security Manager	DG TAXUD A4/CPT	DG TAXUD A4/ISD	DG TAXUD A4/APM	DG TAXUD A3/TAX	DG TAXUD A3/EXC	DG TAXUD A3/CUST	DG TAXUD A3/LISO
CoM.1.1 Identify, extract & list CIs on 9 separate spreadsheets from 9 sources	RA	C	C	C	C	C	C	I	I	I	I	I	I	I
CoM.1.2 Identify each CI in each spreadsheet & add relationships and attributes	RA													
CoM.1.3 Use script or manually import CIs into CMDB	RA													
CoM.1.4 Verify Import of CIs into CMDB after each import	RA													
CoM.2.1 Extract CI information from each source onto spreadsheet, update CMDB & verify	RA	I	I	C	I	I	I	I	I	I	I	I	I	I
CoM.3.1 Compare random sampled records against CMDB	RA	CI	CI	CI	CI	CI	CI	I	CI	CI	CI	CI	CI	CI
CoM.4.1 Identify all CIs linked to the RfC	RA			C										
CoM.4.2 Retrieve CIs history	RA													
CoM.4.3 Generate RfC Analysis Report	RA			I					I	I	I	I	I	I
CoM.4.4 Identify all CIs linked to the data request	RA	C	C		C	C	C							
CoM.4.5 Generate data request report	RA	I	I		I	I	I							
CoM.5.1 Prepare CMDB audit report	RA	C	C	C	C	C	C	I	I	I	I	I	I	I
CoM.5.2 Assess report	RA							CI	CI	I	I	I	I	I
CoM.5.3 Update CMDB	RA							I	I	I	I	I	I	I

Table 4-1: CoM RACI Table

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Communication interfaces with DG TAXUD

Interface description communication with DG TAXUD	Direction	Format
CoM 4 Report on CIs		
CI data request	Incoming	E-mail
CMDB data communicated	Outgoing	E-mail

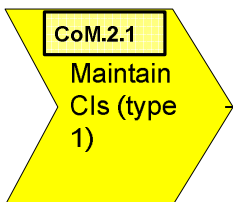
Table 4-2: CoM Communication interfaces with DG TAXUD

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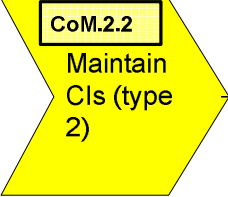
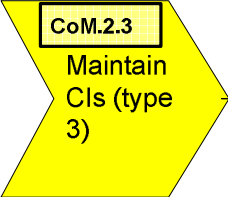
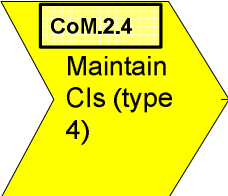
4.4 Level 3: Configuration Management

Procedure	
	<p><u>CoM.1 Identify & Create CIs in CMDB</u></p> <p>To populate the CMDB with CIs, the ITSM Configuration Manager obtains the lists of CIs from each of the 9 CI sources, set out below (CoM 2 and imports the CI information into the CMDB.</p>
<p>CoM.1.1</p> <p>Identify, extract & list CIs on 9 separate spreadsheets from 9 sources</p>	<p>CoM 1.1 Identify, extract & list CIs on 9 separate spreadsheets from 9 sources</p> <p>The ITSM Configuration Manager extracts the CIs, from each of the 9 sources described in CoM.2 below, into separate spreadsheets.</p>
<p>CoM.1.2</p> <p>Identify each CIs in each spreadsheet & add relationships</p>	<p>CoM 1.2 Identify each CI in each spreadsheet & add relationships and attributes</p> <p>The ITSM Configuration Manager adds any required attributes and relationships to each CI in the spreadsheets</p>
<p>CoM.1.3</p> <p>Use script or manually import CIs into CMDB</p>	<p>CoM 1.3 Use script or manually import CIs into CMDB</p> <p>The ITSM Configuration Manager, either manually or by running a script, imports the CI information in each of the 9 spreadsheets of CIs into the CMDB.</p>
<p>CoM.1.4</p> <p>Verify Import of CIs into CMDB after each import</p>	<p>CoM 1.4 Verify Import of CIs into CMDB after each import</p> <p>Once the CIs have been imported into the CMDB, the ITSM Configuration Manager verifies that the CIs have been correctly imported into the CMDB by doing random spot checking of 3% of the CIs also chosen at random.</p>
	<p><u>CoM. 2 Maintain CIs</u></p> <p>For this particular section, and because of the generic process but 9 separate types, the process documentation below describes the procedure at a higher level.</p> <p>The general purpose of the maintenance of the CMDB is to make sure that the CMDB information is always up to date. Besides this, and in order to reinforce the idea that all changes</p>

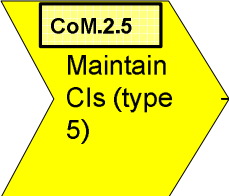
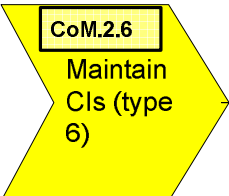
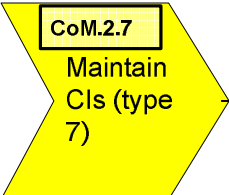
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	<p>and releases within the organisation must go through the Change and Release processes, most CMDB updates happen after the implementation of an RfC, unless the CI is introduced or changed as a result of actions from third party developers, DIGIT or Infra for cases the CI information is obtained as set out in the applicable section below.</p> <p>Depending on the type of CI to maintain into the CMDB, 9 types of maintenance coexist:</p> <ul style="list-style-type: none"> • CoM 2.1 Maintain CIs (type 1): from Change Manager and RfCs; • CoM 2.2 Maintain CIs (type 2): from Excise Change Manager; • CoM 2.3 Maintain CIs (type 3): from DSL; • CoM 2.4 Maintain CIs (type 4): Infrastructure/ COTS/Database from INFRA; • CoM 2.5 Maintain CIs (type 5): Infrastructure/ COTS/Database from DIGIT; • CoM 2.6 Maintain CIs (type 6): Users from MPR/MSR ex Security Management; • CoM 2.7 Maintain CIs (type 7): NA Equipment Inventory; • CoM.2.8 Maintain CIs (type 8): Documentation; • CoM.2.9 Maintain CIs (type 9): NTA & NECA Information.
	<p>CoM.2.1 Maintain CIs (type 1)- from ITSM Change Manager & RfCs</p> <p>This type of maintenance involves the following steps:</p> <ul style="list-style-type: none"> • The ITSM Change Manager sends the minutes of every CAB meeting to the ITSM Configuration Manager • From the minutes, the ITSM Configuration Manager extracts the details of the implemented RfCs and accesses the ITSM SMT to obtain details on the introduced and/or changed CIs and inputs them onto a spreadsheet; • The CoM then manually updates the CMDB; • Monthly, the ITSM Configuration Manager synchronises with the ITSM Change Manager to verify that minutes of each CAB have been sent and received by the ITSM Change Manager to the ITSM Configuration Manager.

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	<p>CoM.2.2 Maintain CIs (type 2): from ITSM Change Manager for Excise</p> <p>This type of maintenance involves the following steps:</p> <ul style="list-style-type: none"> • The ITSM Change Manager for Excise sends an e-mail once a week detailing all the closed RFC's that week to the ITSM Configuration Manager; • From the e-mail, the CoM extracts the details of the implemented RfCs and accesses the SMT to obtain details of the introduced and/or changed CIs; • The CoM then manually updates the CMDB; • Monthly, the CoM synchronises with the ITSM Excise Change Manager to verify that e-mails in respect of each RfC has been sent by the ITSM Excise Change Manager and received.
	<p>CoM.2.3 Maintain CIs (type 3): from DSL</p> <p>This type of maintenance involves the following tasks by the Configuration Manager:</p> <ul style="list-style-type: none"> • The ITSM Release Manager sends the Configuration Manager an e-mail whenever a new application release and/or new application documentation becomes available in the DSL; • The CoM looks into the DSL and extracts details and verifies the addition of the new CI; • The CoM then updates the CMDB Manually; • Monthly the CoM verifies that all new additions to the DSL have been added to the CMDB.
	<p>CoM.2.4 Maintain CIs (type 4): Infrastructure, COTS & Databases from ITSM INFRA</p> <p>This type of maintenance involves the following tasks:</p> <ul style="list-style-type: none"> • INFRA maintains a spreadsheet at XXX. This spreadsheet details all INFRA controlled servers, firewalls, proxy servers, networker backup servers, COTS and Databases and has granted read access to the CoM; • Every week the ITSM Configuration Manager takes a copy of the spreadsheet and runs a script comparing the latest copy with the previous one. The script outputs a third spreadsheet with everything that has been amended or added; • The CoM takes the third spreadsheet and manually inputs the variations into the CMDB;

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	<ul style="list-style-type: none"> The CoM verifies the entries in the CMDB against the new spreadsheet.
	<p>CoM.2.5 Maintain CIs (type 5): Infrastructure, COTS & Databases from DIGIT</p> <p>This type of maintenance involves the following tasks:</p> <ul style="list-style-type: none"> After DIGIT makes any change or addition to the infrastructure, COTS or Databases, they send an e-mail to the ITSM Configuration Manager; The CoM takes the e-mail and makes the changes and/or additions to the CMDB on the basis of the e-mail. As the DIGIT infrastructure is not transparent to ITSM, no additional checks or verifications can be made.
	<p>CoM.2.6 Maintain CIs (type 6): Users from MPR/MSR of Security Management</p> <p>This type of maintenance involves the following tasks:</p> <ul style="list-style-type: none"> The ITSM Configuration Manager receives a copy of the MPR and MSR from the ITSM administrator every month. These documents contain a list of users and their rights; The ITSM Configuration Manager extracts the list of users and their rights from the MPR/MSR into a spreadsheet; The ITSM Configuration Manager takes the latest spreadsheet and the previous month's spreadsheet and runs a script to extract any deletion and addition into a third spreadsheet; The ITSM Configuration Manager then manually updates the CMDB with the changes.
	<p>CoM.2.7 Maintain CIs (type 7): NA Equipment Inventory</p> <p>This type of maintenance involves the following tasks:</p> <ul style="list-style-type: none"> Every quarter, a document detailing NA equipment Inventory (called "MS-ITSMInv-equ General Final Doc" for the moment only produced by DG TAXUD A3/Tax) is to be sent to the ITSM Configuration Manager, listing the distributed applications deployed by the NAs and the supporting infrastructure; The ITSM Configuration Manager extracts information from the MPR/MSR into a spreadsheet; The ITSM Configuration Manager takes the latest spreadsheet and the previous month's spreadsheet and runs a script to extract any deletion or addition into a third spreadsheet;

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	<ul style="list-style-type: none"> The ITSM Configuration Manager then manually updates the CMDB with the changes.
	<p>CoM.2.8 Maintain CIs (type 8): Documentation</p> <p>This type of maintenance involves the following tasks:</p> <ul style="list-style-type: none"> Receive information from the ITSM Release Manager (as stated in Maintain CIs from DSL); Receive information from the ITSM Excise Change Manager (as stated in Maintain CIs from ITSM Change Manager for Excise) – CIRCA; Get a monthly output from the ODL, located on the ITSM Publishing platform (“.xls” output): <ul style="list-style-type: none"> ITSM Configuration Manager does a compare between previous and last output; Request a monthly output from the ITSM Webportal from ITSM Infra and receive responses through the ITSM Service Desk: <ul style="list-style-type: none"> ITSM Configuration Manager does a compare between previous and latest output.
	<p>CoM.2.9 Maintain CIs (type 9): NTA & NECA Information</p> <p>Every 4 months, the ITSM Configuration Manager raises 2 calls to the ITSM Service Desk asking to have the Member States confirming that their (a) NTA and (b) NECA configuration information is as shown at the following locations from the ITSM Webportal:</p> <ul style="list-style-type: none"> NTA: Operational Section / Operations / NCTS Operations / NTA Configuration; NECA: Operational Section / Operations / ECS Operations / ECS NECA Configuration. <p>As responses are received by the Service Desk the information is passed to the ITSM Configuration Manager who collates the information into 2 excel spreadsheets, one for NTA information and one for NECA information. When all responses are received, the spreadsheets are e-mailed by the ITSM Configuration Manager to the ITSM Service Desk who then updates the information on the ITSM Webportal.</p> <p>In case the Member States are required to make configuration changes in between times, and they notify the ITSM Service Desk, this latter sends the information to the ITSM Configuration Manager who updates the appropriate spreadsheet</p>

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	<p>(highlighting the changes) and sends it to the ITSM Service Desk for updating the ITSM Webportal, as described above.</p> <p>The ITSM Configuration Manager then updates the NA CIs in the CMDB and carries out verification by comparing the spreadsheet and the CMDB.</p>
	<p><u>CoM.3 CI Control</u></p> <p>The general purpose of the ITSM Configuration Manager's control process is to ensure quality and integrity of the CMDB by making sure that the data in the CMDB is accurate.</p>
<div style="border: 1px solid black; padding: 2px; width: fit-content;"> CoM.3.1 Compare random sampled records against CMDB </div>	<p>CoM.3.1 Compare random sampled records against CMDB</p> <p>Every month, the ITSM Configuration Manager carries out a self-verification of the accuracy of the CMDB. This is done using the built in checks where applicable, as set out in the "Maintenance" sections of CoM.2, here above. Additionally, the ITSM Configuration Manager takes approximately 10 random samples from each of his/her input sources and verifies that the CIs are indeed referenced into the CMDB. No report is produced as it is a self verification.</p> <p>In the event that there is a discrepancy, the ITSM Configuration Manager identifies the time period when the discrepancy occurred and then back tracks on any missing input in order to ensure that all required CI information is captured. (see CoM.5.3 Update CMDB)</p>
	<p><u>CoM.4 Report on CIs</u></p> <p>One of the main CMDB roles is to be a central repository for all CI information within the organisation. Therefore, the ITSM Configuration Manager is bound to receive many data request coming from AM, Inf, RM, ChM, SEC, or any other ITSM stakeholder.</p> <p>There are 2 types of data request:</p> <ul style="list-style-type: none"> • RfC analysis request: in order to perform its role effectively ITSM Change Manager needs to analyse the impact of all Change Requests, therefore the need for an overview of all CIs linked to the Change Request with their change history as well. This input triggers the activity "4.1 Identify all CIs linked to the RfC"; • CI data request: this input can come from any ITSM stakeholder and triggers the activity "4.4 Identify all CIs linked to the data request". <p>DG TAXUD A4/CPT is entitled to request this information by sending an e-mail to the Configuration Manager. And also has direct read access to the CMDB on the file share.</p>

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<div>CoM.4.1</div> <div>Identify all CIs linked to the RfC</div>	CoM.4.1 Identify all CIs linked to the RfC On receipt of a query, the ITSM Configuration Manager shall identify the CIs that are the subject of the RfC and interrogate the CMDB by using SQL queries. The result is a report in “.csv” format showing the list of all CIs applicable to and/or impacted by the Change Request with their respective attributes and details. PS: These queries are under development at ITSM AM.
<div>CoM.4.2</div> <div>Retrieve CIs history</div>	CoM.4.2 Retrieve CIs history A report containing all CIs change history applicable to and/or impacted by the Change Request is generated monthly by querying the CMDB. Therefore a visibility on all CIs change history is provided either online or via specific reporting (development ongoing).
<div>CoM.4.3</div> <div>Generate RfC analysis report</div>	CoM.4.3 Generate RfC analysis report The list of all CIs linked to the Change Request and the history of all these CIs are merged together to produce the Change Request analysis report. Finally, the report is sent by e-mail to the ITSM Change Manager.
<div>CoM.4.4</div> <div>Identify all CIs linked to the data request</div>	CoM.4.4 Identify all CIs linked to the data Request All requested CIs are identified by querying the CMDB. Then, all relationships and relevant attributes from all CIs are identified as well.
<div>CoM.4.5</div> <div>Generate data request report</div>	CoM.4.5 Generate data request report All the information gathered during the activity “CoM 4.4 – Identify all CIs linked to the data request” is merged in order to produce the applications data report. The report is then sent by e-mail to the requestor.
	<u>CoM.5 Internal CMDB Audit</u> The only way to ensure that the CMDB data are as accurate as possible is to perform Internal Quality Audit on a regular basis (minimum 2 times a year). The activities described below explain this process, which starts with an arbitrary set of CIs to audit.
<div>CoM.5.1</div> <div>Prepare CMDB audit reports</div>	CoM.5.1 Prepare CMDB Audit report A report containing the data of all the audited CIs is generated from the CMDB and sent by e-mail to the CI owners who initiate the task “Audit reports to be verified”.
<div>CoM.5.2</div> <div>Assess report</div>	CoM.5.2 Assess report As the CI owners send back the report by e-mail, a check is performed by the CI-owner to determine whether the CIs data is accurate or not. If the data is not accurate, then the activity

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	“CoM 5.3 – Update CMDB is performed. If the data is accurate, then the activity CMDB audit is considered as being completed.
<div>CoM.5.3</div> <div>Update CMDB</div>	<p>CoM.5.3 Update CMDB</p> <p>In order to remove the discrepancies between the CMDB data and the actual CIs data, the relevant CI and relationships data are updated within the CMDB at the end of the Audit exercise.</p> <p>Then, the audit is complete.</p>