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TAXATION AND CUSTOMS UNION DG
ITSM

SUBJECT:

FQP - Annex 26: Demand Management

FRAMEWORK CONTRACT # TAXUD/2007/CC/088

DOCUMENT HISTORY

Edi.	Rev.	Date	Description	Action (*)	Pages
0	01	02/12/2009	First Draft	I	All
0	02	9/12/2009	Sent for internal review	I	As req.
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0	10	01/02/2010	Sent for review to DG TAXUD after internal QC	I	All
1	00	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 TAXUD) [A1], Work Package WP.0.1.

This document presents the Level 1, 2 and 3 of the ITSM process FQP - Annex 26: Demand Management.

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

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 General 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.

4. TSM Process model

4.1 Level 0: Process flows

Figure 4-1: ITSM Process Model

4.2 Level 1: Demand Management

The Demand Management process ensures that requests for services are properly recorded, communicated, analysed, executed, reported and followed up.
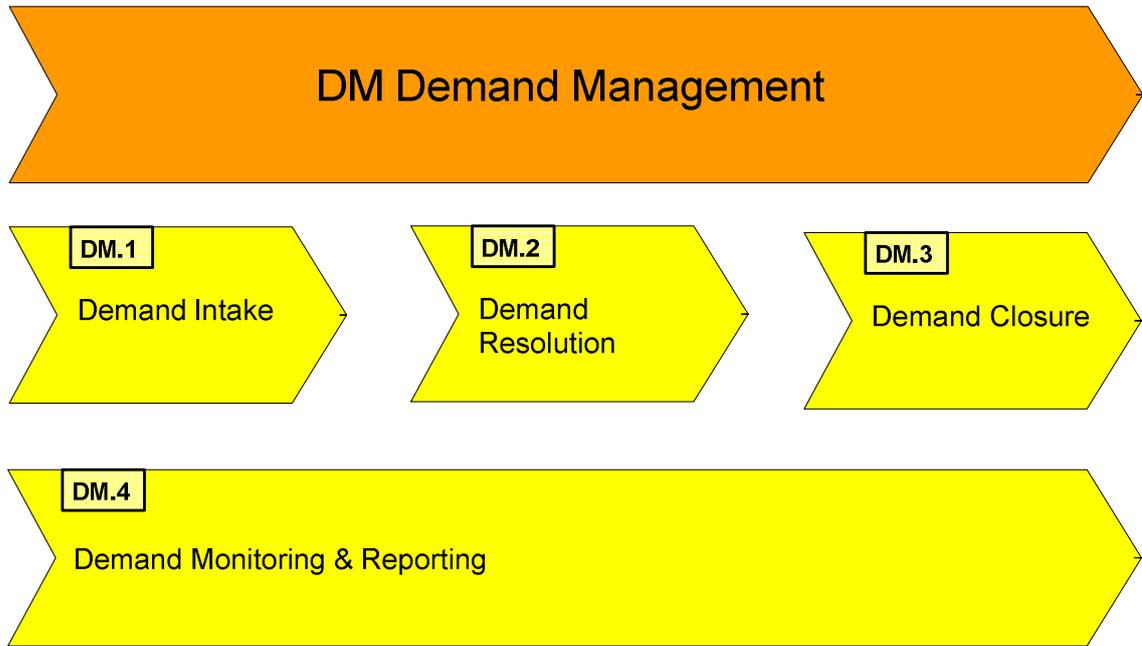
Figure 4-2: DM Level 1 Diagram

4.3 Level 2: Demand Management

DM.1 – Demand Intake

Service Requests can come to ITSM via the following channels:

1) The Requestor/Issuer generates a Service Request via the Service Catalogue on theWeb Portal or contacts ITSM Service Desk directly;

2) The Requestor/Issuer generates a Service Request by directly contacting the ITSM Business Thread Manager.
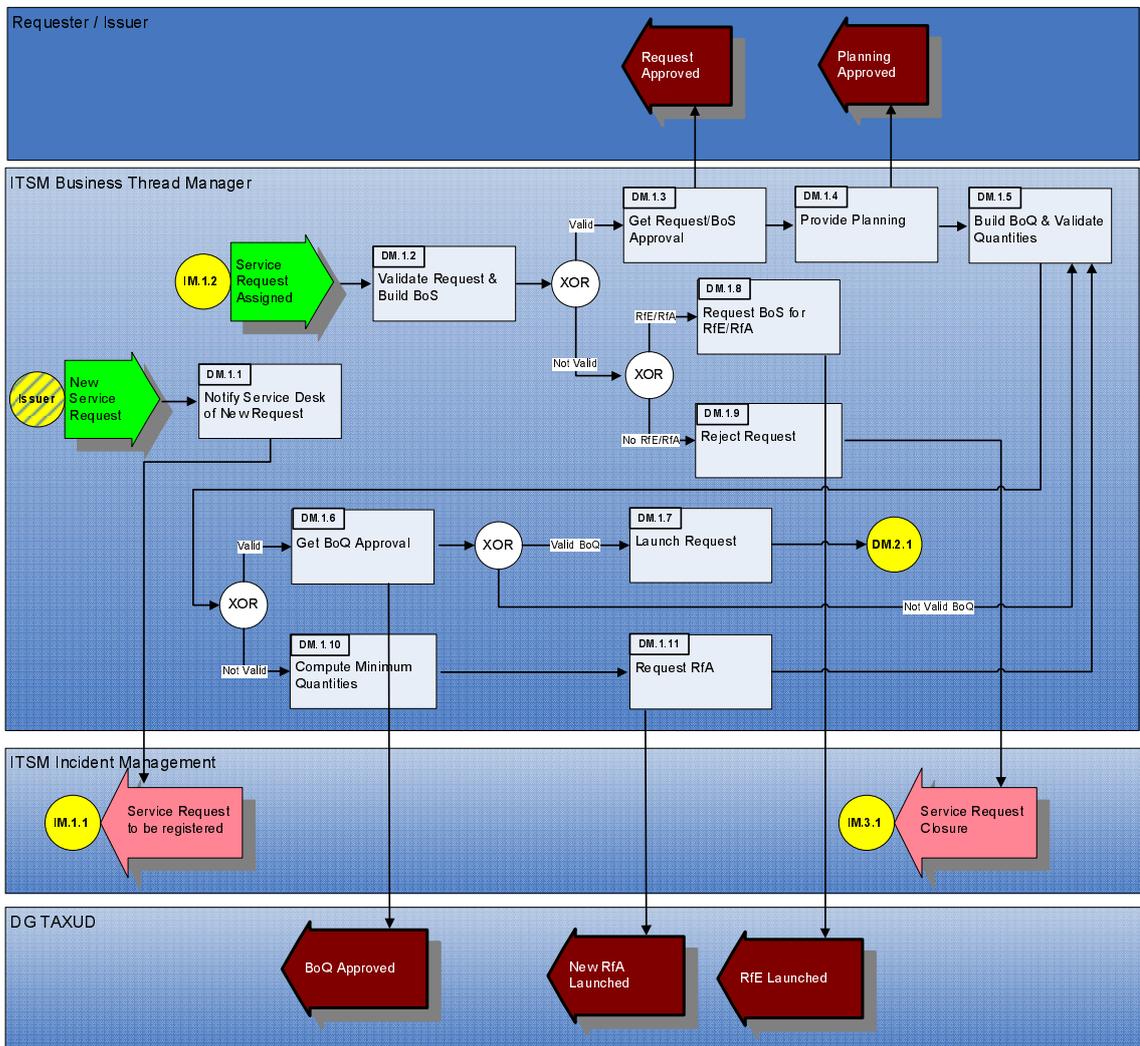
Figure 4-3: DM.1 Demand Intake

DM.2 – Demand Resolution

Once the Service Request has been allocated to an assignee i.e. ITSM process owner, the execution of the request can start. In some cases, depending on type of request, the resolution might start immediately while in other cases the request goes into a plan for later execution. In most cases the Service Request would be composed of multiple sub-tasks that would be assigned separately to the different ITSM process owners.

DM.2 Demand Management – Resolution
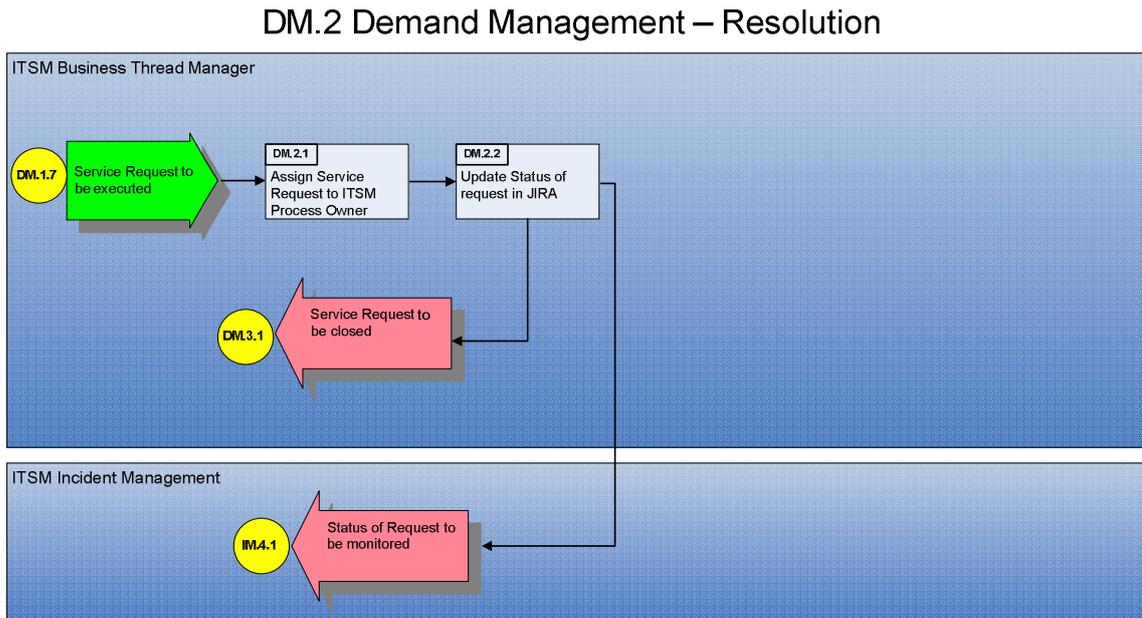
Figure 4-4: DM.2 Demand Resolution

DM.3 – Service Request Closure

When all the sub-tasks within a Service Request have been successfully executed, the request can be closed. This can happen directly after execution or when the ITSM Business Thread Manager finds Service Requests that are solved, but still open.
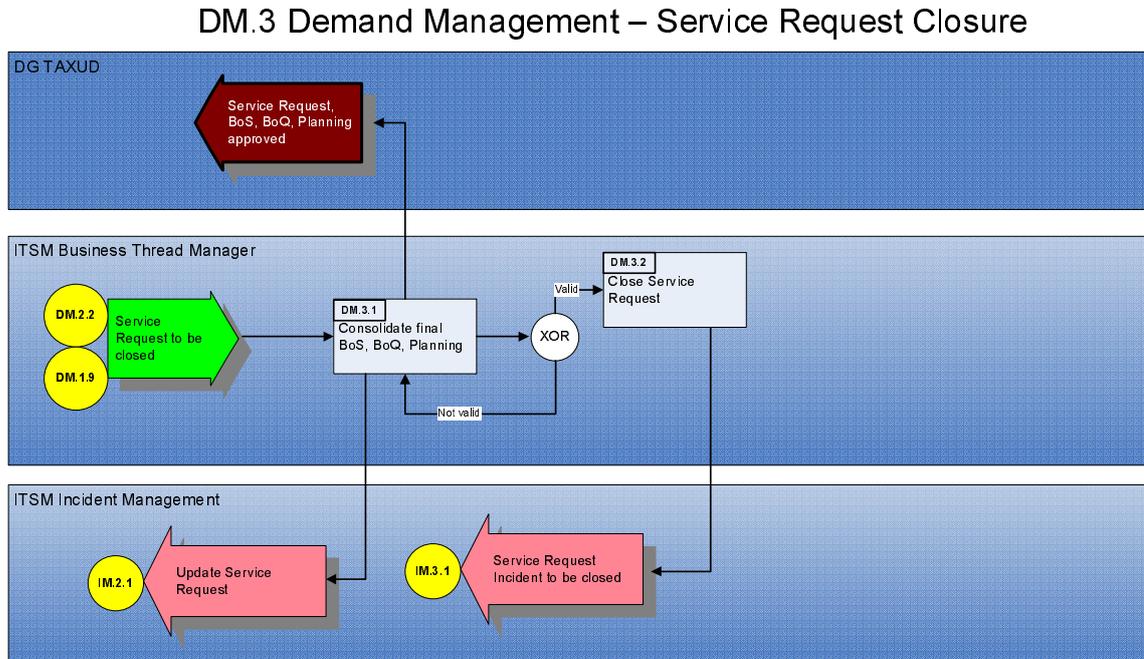
Figure 4-5: DM.3 Service Request Closure

DM.4 – Demand Monitoring & Reporting

This figure describes the follow-up of the Service Requests process as well as the internal reporting.
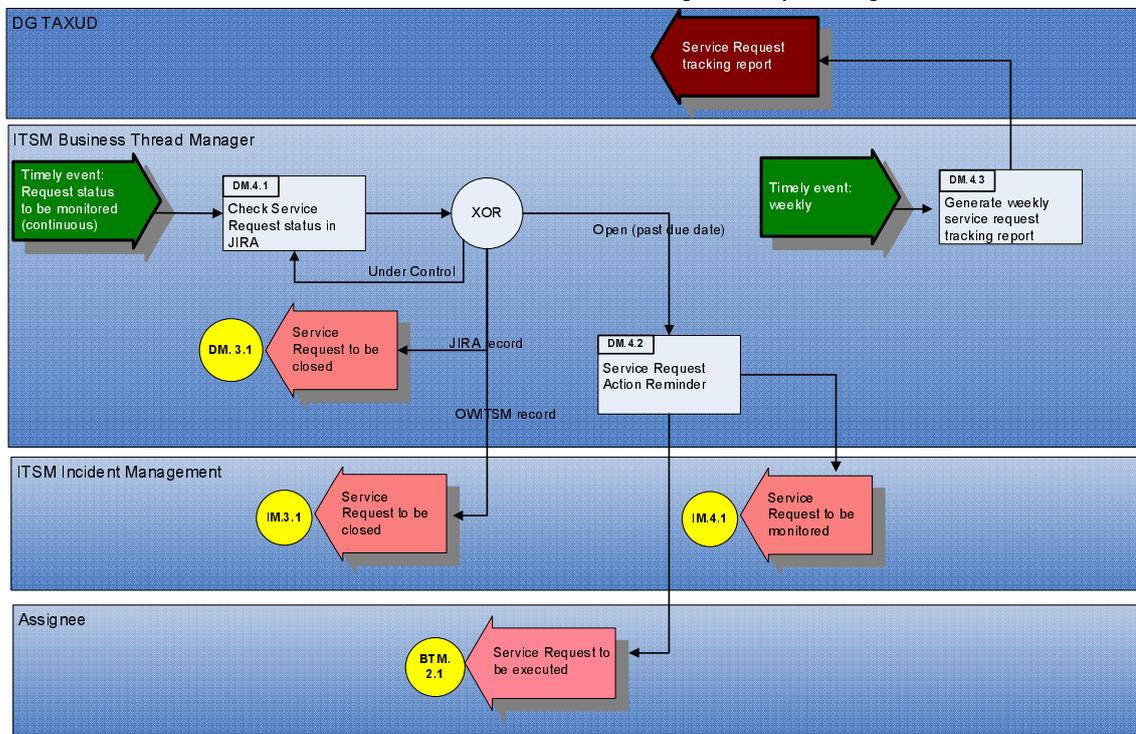
Figure 4-6: DM.4 Demand Monitoring & Reporting

Note linked to the ordering of additional quantities:

In parallel with the monitoring of the Requests, the ITSM DM also follows-up the consumption of the quantities. Once the DM detected a need to request for additional quantities, the DM will contact DG TAXUD/A4/CPT (90% rule).

RACI Table for Demand Management

| Activity	ITSM Business Thread Manager	ITSM Incident Manager	Requester / Issuer	DG TAXUD A4/CPT	ITSM Process Owner
DM.1.1 Notify Service Desk of New Request	A/R	R	I		
DM.1.2 Validate Request and BoS	A/R		I		
DM.1.3 Get Request/BoS approval	A/R	R	C		
DM.1.4 Provide Planning	A/R	R			C
DM.1.5 Build BoQ & Validate quantities	A/R	R		C	
DM.1.6 Get BoQ approval	A/R	R		A	
DM.1.7 Launch Request	A/R				R
DM.1.8 Request BoS for RfE/RfA	A/R	R	I/R	C	
DM.1.9 Reject Request/Close request	A/R	I/R	I	I	
DM.1.10 Compute minimum Quantities	A/R		I		
DM.1.11 Request RfA	A/R		I	C	
DM.2.1 Assign Service Request					A/R
DM.2.2 Update Status of request in JIRA	A/R				R
DM.3.1 Consolidate final BoS, BoQ, Planning	A/R	R		C	
DM.3.2 Close Service Request	A/R	I/R	I		
DM.4.1 Check Service Request status in JIRA	A/R				
DM.4.2 Service Request action reminder	A/R				I
DM.4.3 Generate weekly Service Request tracking report	A/R				

Table 4-1: DM RACI Table

Communication interfaces with DG TAXUD

Interface description communication with DG TAXUD	Direction	Format
DM.1.1 Notify Service Desk of new request		
Receive Service Request	Incoming	E-mail and ITSM Webportal
Acknowledgment of Service Request	Outgoing	Email
DM.1.3 Get Request/BoS approval		
Request for approval of BoS	Outgoing	Email
Decision on BoS	Incoming	Email
DM.1.4 Provide Planning		
Request for approval of planning	Outgoing	Email
Decision for the proposed planning	Incoming	Email
DM.1.5 Build BoQ & Validate quantities		
Approval of BoQ	Outgoing	Email
DM.1.6 Get BoQ approval		
Validation of BoQ	Incoming	Email
DM.1.8 Request BoS for RfE/RfA		
Request issuance of RfE	Outgoing	Email
Preparation of Technical Annex and issuance of RfE	Incoming	Email
DM.1.9 Reject Request		
Asking for confirmation of non-contractual service request	Outgoing	Email
Invalidation of service request	Incoming	Email
Rejection of service request	Outgoing	Email
Closure of service request	Incoming	Email
DM.1.10 Compute minimum Quantities		
Notification of unavailability of contractual quantities	Outgoing	Email
DM.1.11 Request RfA		
Request for new RfA "on-demand" budget	Outgoing	Email
Issuance of new RfA	Incoming	Email
DM.3.1 Consolidate final BoS, BoQ, Planning		
Request approval of final BoQ	Outgoing	Email
Final approval of BoQ/BoS/Planning	Incoming	Email
DM.3.2 Close Service Request		
Request for the Closure of Service Request	Outgoing	Email
Closure of Service Request	Outgoing	Email

Table 4-2: DM Communication interfaces with DG TAXUD

4.4   Level 3: Demand Management

Procedure	
	Introduction The Demand Management process ensures that requests for services are properly recorded, communicated, analysed, executed, reported and followed up. The Service Requests are requested and recorded via the following channels: • The Service Catalogue website on the ITSM Webportal; • The ITSM Service Desk (SD); • The ITSM Business Thread Manager(s). The purpose of recording requests for services is to ensure that traceability, responsibility, and reporting can be provided. It also enables quantity tracking and most importantly follow-up of the requests. The Service Requests are dispatched and followed up by the Business Thread Manager(s). It is the responsibility of the Business Thread Manager(s) to track, forecast, communicate and coordinate all Demand Management activities with the relevant ITSM service providers / process owners. Hence Demand Management is essentially the "shop window" of ITSM supported by the Business Thread Managers, Service Desk and other relevant ITSM Process Owners. **Demand Management Goals & Objectives** The primary goal of Demand Management will be to ensure the optimal execution of Service Requests. The Business Thread Manager(s) (hereon referred to as Demand Manager) will have the overall view of all Service Requests and their statuses. Hence, the Demand Manager will have the global view of which services can be requested and to whom they need to be dispatched. The Demand Manager will be able to notify the necessary ITSM Process Owners (Application Management, Testing, Business Monitoring, Business Perspective, etc.) of impending workloads (based on Service Requests, Deliverable Tracking Matrix, Global Planning etc…). It is the responsibility of the Demand Management to track, forecast, communicate and coordinate all On-demand Service Request activities (but not to execute or manage the project management activities)

with the relevant ITSM Process Owners.

The main responsibilities of Demand Manager i.e. Business Thread Manager(s) will be to:

- Ensure that Service Requests are correctly registered and dispatched to the appropriate ITSM Process Owner;
- Visit and interface with potential Service Requestors / Issuers;
- Validate the incoming Service Requests by discussing with DG TAXUD A4/CPT;
- Gather requirements specification for the Service Request if needed;
- Ensure that Service Requests are correctly registered and dispatched to the appropriate ITSM Process Owner;
- Ensure that all pertinent information regarding the Service Request is recorded to provide maximum transparency;
- Provide timely and frequent consolidated reporting (BoS, BoQ) on Service Requests;
- Provide forward planning for Service Requests (demand, volume, etc);
- Communicate and collaborate with the Service Desk.

The Business Thread Manager(s) will establish him/herself as the key person for explaining, communicating and coordinating ITSM Request for Services with the officials of DG TAXUD A4/CPT.

To efficiently manage the Demand Management process, the Business Thread Manager(s) will need to have a clear and complete understanding of the following artefacts:

- The ITSM Terms of Reference;
- The ITSM Framework Contract;
- The Specific Contracts currently under execution;
- The ITSM Service catalogue;
- The ITSM JIRA Tool;
- The DG TAXUD A4/CPT Organisation and key stakeholders.

The Demand Manager as well as the Business Thread Manager(s) will closely monitor the quantities (budgeted, consumed, remaining). This information is available on-line on JIRA.

DM.1 Demand Intake

A Service Request can come to ITSM via the following channels:

1) The "Issuer" generates a Service Request via the online Service Catalogue on the ITSM Webportal, which sends an automatic e-mail to the Service Desk;

2) The "Issuer" generates a Service Request by sending an e-mail to (or calling) the Service Desk (SD);

3) The "Issuer" generates a Service Request by directly contacting (e-mail/meeting) the Business Thread Manager (BTM).

The communication channels to place a Service Request in order of preference are:

- E-mail to Service Desk or BTM (preferred);
- ITSM Webportal.

DM.1.1

Notify Service Desk of New Request

DM.1.1 Notify Service Desk of New Request

If the BTM directly receives the request, the BTM asks the SD to create a new incident (INC) in the ITSM SMT.

The Request is sent to SD via e-mail and the e-mail content contains:

- Issuer identity;
- Business Thread;
- Original e-mail from issuer (if applicable);
- Reference to the meeting where the decision was taken (if applicable);
- Identity of the referenced CI + version (if applicable);
- Any other information linked to the initial request;
- Category to be assigned to the new INC.

Once the new Service Request has been received by the SD, it is registered and classified as a call in the ITSM SMT according to the correct Service Request categorisation and assigned a new INC number.

The SD creates the new INC in the ITSM SMT, with the following data:

- Issuer identity (the actual Issuer, not the BTM);
- Reception date/time (time of reception of the e-mail, issued by BTM);
- Business Thread;

- The e-mail sent by BTM, in attachment;
- Exposed CI and version (if applicable);
- Category (based on this information sent by BTM).

The SD creates the ACK task to acknowledge the receipt of the Service Request, sends the ACK mail to the actual issuer, and closes the ACK task.

The SD then creates a new task for the creation and delivery of the "Bill of Services" (BoS) and assigns this task to one of the following Business Thread resolvers:

- Wait.BoQ_Customs;
- Wait.BoQ_Excise;
- Wait.BoQ_Taxation;
- Wait.BoQ_ITSM.

This task is automatically assigned and sent by the ITSM SMT to the corresponding BTM.

If a decision to create a new Service Request is taken during a meeting, not attended by a BTM:

The person in charge of the minutes of the meeting is responsible for documenting the decision to create a new Service Request. If this person is a ... member, (s)he creates an action in JIRA (subject to SQI03) and assigns it to the BTM.

If this person is not a ... member (e.g. QA Contractor), the ... representative who attended the meeting has to create an action in JIRA (subject to SQI03) and assigns it to the BTM.This action will request the BTM to initiate the "new request" procedure.

DM.1.2
Validate Request & Build BoS

DM.1.2 Validate Request and Build Bill of Services (BoS)

The task to create a new Bill of Services (BoS) is initiated when one of the BTMs receives an e-mail from SD/ ITSM SMT, for the creation and delivery of the "Bill of Services" (BoS).

Upon receipt of the e-mail the BTM records the task in JIRA by:

- Creating new JIRA# "Request for Service", links it to ITSM SMT/INC# and attaches the e-mail received from SD/ITSM SMT;
- Creating a sub-task in JIRA (linked to JIRA#) for the

	generation of the BoS (resolver: the BTM). To generate the BoS (i.e. as a JIRA sub-task) the BTM: • Validates the request against the contract; • Builds list of SE.x and DLV.x, based on initial input; • If necessary, contacts the Issuer to collect any additional info to build final scope (via e-mail or phone).
DM.1.3 Get Request/BoS Approval	**DM.1.3 Get Request/BoS Approval** If the scope of the Service Request is "contractually" covered, the BTM sends the BoS to the SD as answer to the INC. The SD: • Records the BoS in the ITSM SMT and closes it; • Creates a new INC and requests the issuer to approve the BoS (resolver: the Issuer). The Issuer: • Receives the request for approval from the SMT; • Provides his/her decision to the SD. The SD: • Records the decision from the issuer and closes this step. If decision is "negative": • The SD creates a new INC a step nd assigns it to the BTM, requesting the latter to review the BoS. If decision is "positive": • The SD creates a new INC astepnd assigns it to the BTM, requesting the Planning (SQI12 clock starts). The resolvers for this activity are: • ITSM.Planning-Taxation; • ITSM.Planning-Excise; • ITSM.Planning-Customs; • ITSM.Planning-ITSM. The rationale behind this resolver is: • ITSM is a resolver and the SQI12 clock is enabled; • The corresponding BTM receives the action.
DM.1.4 Provide Planning	**DM.1.4 Provide Planning** The Planning for the Service Request is initiated once the BTM receives an e-mail from SD/ ITSM SMT for the planning. The BTM: • Creates a new JIRA sub-task to provide the planning.

...:

- ... prepares and defines a planning for all SE.x and DLV.x, of the Request for Service, based on available data and constraints;
- Everyone provides the input via JIRA. Once completed, the JIRA sub-task(s) is/are closed.

The BTM:

- Once all tasks linked to the planning are closed, the BTM is notified and consolidates the planning;
- Sends the planning as answer to INC, to SD; and
- Requests SD to open a new task for the Issuer to approve.

SD:

- Records the information provided by the BTM in the INC and closes this step; (SQI12 clock stops);
- Creates a new INC:
  - o Resolver: Issuer;
  - o Activity: please approve planning;
  - o Data: planning.

Issuer:

The Issuer provides the decision linked to the proposed planning to the SD, via e-mail and as answer to the INC.

Service Desk:

- Records the decision from the Issuer in ITSM SMT and closes this step;
- Creates a new step (INC) and assigns it to the BTM.
- Case 1: the planning is approved:
  - o The new step activity is: Provide BoQ;
  - o Resolver is (depending on Business Thread):
    - ▪ Wait.BoQ_Customs;
    - ▪ Wait.BoQ_Excise;
    - ▪ Wait.BoQ_Taxation;
    - ▪ Wait.BoQ_ITSM.
- Case 2: the planning is rejected:
  - o The new task activity is: Review Planning;

	o SQI12 clocks restarts.

DM.1.5
 	
Build BoQ & Validate Quantities
	DM.1.5 Build Bill of Quantities (BoQ) and Validate Quantities
	
	The Bill of Quantities (BoQ) is initiated once the BTM receives an e-mail from SD/ ITSM SMT.
	
	The BTM:
	
	• Creates a new JIRA sub-task for the provision of the BoQ;
	
	• Builds the BoQ, based on the BoS;
	
	• Checks the obtained quantities against SC/Budgeted quantities left.
	
	There can be two scenarios:
	
	1) If the amount of budgeted Quantities left is sufficient:
	
	    The BTM:
	
	        o Records the BoQ in JIRA;
	
	        o Sends the BoQ as answer to the INC to SD
	
	            ▪ BoS / BoQ;
	
	            ▪ Copy of approval from Issuer.
	
	        o Closes the BoQ JIRA sub-task.
	
	    The SD:
	
	        o Records BoQ and other data in the INC and closes this step;
	
	        o Creates a new step (INC):
	
	            ▪ Resolver : DG TAXUD A4/CPT;
	
	            ▪ Subject: please approve BoQ;
	
	            ▪ Attachment: BoS/BoQ/Data
	
	2) If the amount of budgeted Quantities left is not enough, this could happen when no quantities are left for a certain request (or part of the request).

DM.1.6 Get BoQ Approval	**DM.1.6 Get BoQ Approval** The Approval of BoQ is initiated when DG TAXUD A4/CPT receives a request to approve BoQ, via ITSM SMT. DG TAXUD A4/CPT: • Validates the BoQ; • If necessary, contacts either the BTM or Issuer for additional

information;

- Sends conclusions to SD, via e-mail.

The SD:

- Records the conclusions in ITSM SMT;

- Creates a new INC#:

    Case 1: The BoQ is approved:

    - o The new step activity is: Proceed with Service Request;

    - o Resolver is (depending on Business Thread):

        - WAIT.Completion-Customs;

        - WAIT.Completion-Excise;

        - WAIT.Completion-Taxation;

        - WAIT.Completion-ITSM.

    - o Please note that the BTM is also a recipient of this new step.

    Case 2: The BoQ is rejected:

    - o The step is assigned to the BTM, subject: Review BoQ

DM.1.7
Launch Request

DM.1.7 Launch Request

The Service Request is launched when the BTM receives an e-mail from SD/ITSM SMT with a reference to launch the request.

The BTM:

- Records the approval of the BoQ;

- Closes JIRA sub-task linked to the BoQ;

- Creates new JIRA sub-task:

    - o Resolver: PMO;

    - o activity: book quantities

- Creates another JIRA sub-task:

    - o Resolver: PMO;

    - o activity: create SE.x and DLV.x tasks in JIRA

PMO:

- PMO is automatically informed by JIRA;

- JIRA Sub-task to book activities:

    o PMO books the quantities: status "Ordered";

      This results in a decrease of the quantities left for other Service Requests;

    o Closes the JIRA sub-task

- JIRA Sub-task to create SE.x and DLV.x:

    o Using the information contained in both BoS and Planning, the PMO:

    o Creates all entries in the DTM linked to deliverables;

      Entries in the DTM are also linked to ITSM SMT and JIRA and/or RfA.

    o Creates all entries in JIRA linked to deliverables, services and assigns them;

      Entries in JIRA are all linked to this initial JIRA #

    o Once done, closes JIRA sub-task.

...:

- Once all entries linked to Services/Deliverables have been created in JIRA, the corresponding ITSM process owners / service providers are automatically notified by JIRA.

DM.1.8

Request BoS for RfE/RfA

DM.1.8 Request BoS for RfE/RfA

This procedure is triggered when there is need for an RfE/RfA to cover the request.

The BTM:

- Sends an e-mail to SD informing that there is a need for an RfE/RfA. The e-mail will contain:

    o Copy of e-mail exchange with DG TAXUD A4/CPT, confirming the need for the RfE/RfA;

- Attaches this e-mail to JIRA BoS task;

- Informs the Issuer by e-mail.

The SD:

- Records all this information in BoS INC# (the task is kept open);

- Creates a new INC#:

	o Resolver: DG TAXUD A4/CPT;
	o Title: Issue RfE
	o Attachment: e-mail from BTM.

Issuer:

- Prepares the Technical Annex of the RfE to be issued and provides it to DG TAXUD A4/CPT.

DG TAXUD A4/CPT:

- Issues the RfE (official letter to ... management) and via email to the Demand Manager.

NOTE:

As an RfE is an official letter to be sent to the ITSM Contractor, this letter (or its content) cannot be recorded in ITSM SMT.

DM.1.9

Reject Request/Close Request

DM.1.9 Reject Request/Close request

In case the request is not "contractually" covered, the BTM will contact DG TAXUD A4/CPT (by e-mail).

- DG TAXUD A4/CPT (in-)validates the request;
- If a solution is found, the BTM resumes the activity (DM.1.3);
- If no solution is found:
    - o No RfE/RfA will be issued:

  The BTM:
    - o Prepares an answer to the SD/Issuer and annexes it to JIRA;
    - o Sends an answer to SD by e-mail;
    - o Closes JIRA sub-task;
    - o Closes JIRA main-task

  The SD:
    - o Annexes answer from BTM in the ITSM SMT;
    - o Sends "rejection e-mail" to Issuer (cc DG TAXUD A4/CPT), with explanation given by BTM;
    - o Closes the INC# for BoS;
    - o Creates a new INC# "Request for Closure" to the Issuer;

> o The Issuer has to answer the ITSM SMT incident step in order to have the initial request closed.

DM.1.10

Compute Minimum Quantities

DM.1.10 Compute Minimum Quantities

This action is initiated when during the definition of the BoQ, the BTM notices that there are no quantities left to cover the whole Service Request.

The BTM:

- Records this information in JIRA;

- Notifies the Issuer by e-mail, that no more quantities are available and that DG TAXUD A4/CPT is contacted to solve this contractual "issue";

- Calculates the minimal amount of necessary quantities to fulfil the request.

DM.1.11

Request RfA

DM.1.11 Request RfA

This action is initiated once the minimum quantities for the BoQ have been calculated.

The BTM:

- Contacts DG TAXUD A4/CPT to request a new RfA "on-demand" budget;

- The process is put on "hold" until new RfA ("on-demand" budget) has been issued by DG TAXUD A4/CPT.

DG TAXUD A4/CPT:

- Issues new RfA to cover this Service Request and transmits this RfA to ..., including the BTM.

Once the BTM has been notified of the arrival of the new RfA:

- The BTM contacts the Issuer to notify him/her that the Service Request process is resumed.

DM.2 Demand Resolution

Once the Service Request has been allocated to an assignee, the execution of the request can start. In some cases, depending on the type of request, the resolution might start immediately while in other cases the request goes into a plan for later execution.

DM.2.1

Assign Service
Request to ITSM
Process Owner

DM.2.1 Assign Service Request to ITSM Process Owner

The assignee of the Service Request takes full responsibility to implement/execute the Service Request.

If necessary, the assignee of the Service Request creates the necessary sub-tasks in JIRA and assigns each one of them to the corresponding sub-assignee. The assignee and/or sub-assignee(s), with help of other stakeholders if need be, can now carry out the request as specified in the BoS.

DM.2.2

Update Status of
request in JIRA

DM.2.2 Update Status of Request in JIRA

Once all sub-tasks have been resolved, the assignee/owners of the Service Request sub-tasks can change the status of their corresponding tasks to 'Resolved'. The assignee of the Service Request sub-tasks is solely responsible for updating the status of the Service Request sub-tasks in JIRA. It is the responsibility of the Business Thread Manager to follow up on the request and ensure that the ITSM Service Desk's updates the request on ITSM SMT.

DM.3 Service Request Closure

When the Service Request has been successfully executed and the BoS, BoQ and Planning have all been approved by DG TAXUD A4/CPT, the request can be closed. This can happen directly after execution by the ITSM Business Thread Manager(s) or during the monitoring and review phase when the ITSM Business Thread Manager finds Service Requests that are solved, but still in open status.

DM.3.1

Consolidate final
BoS, BoQ, Planning

DM.3.1 Consolidate final BoS, BoQ, Planning

This action is initiated once all activities linked to a certain Service Request are closed and the BTM is notified by JIRA.

The BTM:

- Consolidates the final version of the BoS/BoQ; (ordered/consumed/not consumed);

- Consolidates the final version of the Planning;

- Consolidates the history of the whole Service Request;

- Sends all this information to the SD.

The SD:

- Records the information provided by the BTM and closes this step;

- Creates a new step:

  - o Resolver : DG TAXUD A4/CPT;

  - o Subject: please approve Final BoQ;

  - o Attachment: BoS/BoQ/Data.

DG TAXUD A4/CPT and the Demand Manager:

- Checks the final BoQ/BoS/planning;

- Provides the final decision to the SD.

The SD:

- Records the decision, given by DG TAXUD A4/CPT and closes the step;

- Creates a new step:

  - o Resolver:

    - • Wait.BoQ_Customs;

    - • Wait.BoQ_Excise;

    - • Wait.BoQ_Taxation;

    - • Wait.BoQ_ITSM

Case 1: Final BoQ not approved:

- The BTM receives the rejection of the Final BoQ;

- The BTM review the decision from DG TAXUD A4/CPT;

- The flow continues as described at the beginning of DM3.1 (see above).

Case 2: Final BoQ is approved and Service Request is closed (DM.3.2)

DM.3.2
Close Service
Request

DM.3.2 Close Service Request

This action is initiated once the BoS, BoQ and Planning have been approved by DG TAXUD A4/CPT and the BTM receives an e-mail from SD/ITSM SMT for closure of the request.

The BTM:

• Creates a new task in JIRA (JIRA.112233.x) to request PMO to record the final consumption of the quantities;

• Answers the e-mail sent by SD/SMT and asks the SD to proceed with request for closure.

PMO:

• Records the consumption of all linked quantities;

• If not consumed quantities, reset their state to "budgeted";

• Closes the task. Once the task is closed, the BTM is notified and can close the JIRA Request for Service.

The SD:

• Closes the task;

• Creates a new task: request for closure and assigns it to the Issuer.

DM.4 Demand Monitoring and Reporting

On a daily basis the current status of all Service Requests is monitored by the ITSM Business Thread Manager(s). On a weekly basis they also generate reports (per Business Thread) outlining all Service Requests and their current status. The follow-up and reminders of Service Requests is also the role of the ITSM Business Thread Manager(s).

DM.4.1
Check Service
Request status in
JIRA

DM.4.1 Check Service Request status in JIRA

The ITSM Business Thread Manager(s) monitors the JIRA tool for Service Requests and gain approval of the Service Requests from DG TAXUD A4/CPT when necessary or initiates further talks with the Requestor/Issuer if necessary. The BTM views and extracts all relevant Service Request information from the JIRA tool into a spreadsheet for internal monitoring purposes.

DM 4.2
Service Request
Action Reminder

DM.4.2 Service Request action reminder

The ITSM Business Thread Manager(s) follows-up with the ITSM Service Providers (assignee) and sends reminders (via e-mail or preferably direct contact) if necessary to take

	appropriate action.
DM.4.3 Generate weekly service request tracking report	## DM.4.3 Generate weekly Service Request tracking report On a weekly basis, the ITSM Business Thread Manager(s) consolidates the "Service Request tracking excel sheet". The report includes all the necessary information related to the Service Requests such as Work Package, quantity, description, dates (creation date, closure date), requestor name, status, priority, Business Thread, application etc. The ITSM Business Thread Manager(s) manages and distributes the "Service Request tracking excel sheet" primarily for internal purposes.