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1. PURPOSE. The purpose of the Enterprise Information Technology Service Management (ITSM) Request Fulfillment Management Process Guide is to establish a documented and clear foundation for process implementation and execution across the Marine Corps Information Environment (MCIE). Process implementation and execution at lower levels (e.g., Regional, Local and Programs of Record) must align and adhere to directives and schema documented within this guide. The use of this guide enables USMC Information Technology (IT) activities through promoting standardization of work instructions and operating procedures across a continuum of document specificity.

2. CANCELLATION. 2300-08.

3. AUTHORITY. The information promulgated in this publication is based upon policy and guidance contained in reference (a).

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5. SCOPE.

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b. Waivers. Waivers to the provisions of this publication will be authorized by the Director, Command, Control, Communications and Computers.

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Enterprise IT Service Management
Request Fulfillment
Process Guide

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Enterprise IT Request Fulfillment Process Guide

1.0 INTRODUCTION

1.1 Purpose

The purpose of this process guide is to establish a documented and clear foundation for process implementation and execution across the Marine Corps Information Environment (MCIE). Process implementation and execution at lower levels (e.g., Regional, Local, and Programs of Record) must align and adhere to directives and schema documented within this guide. The use of this guide enables USMC IT activities through promoting standardization of work instructions and operating procedures across a continuum of document specificity as represented in Figure 1.

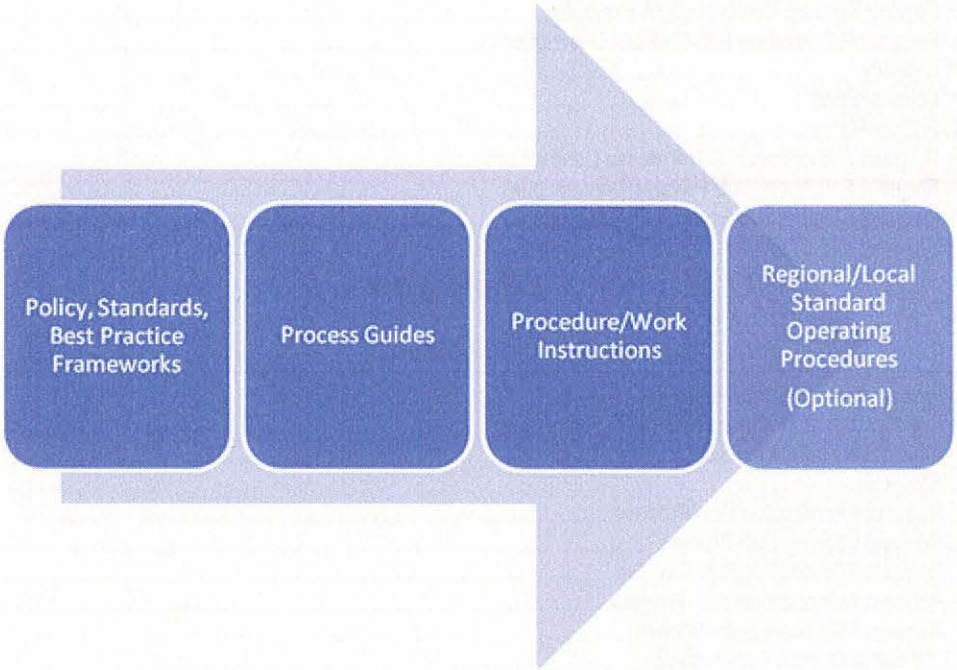

Figure 1: Process Document Continuum

1.2 Scope

The scope of this document covers all services provided in support of the MCIE for both the Secret Internet Protocol Router Network (SIPRNET), and the Non-Secure Internet Protocol Router Network (NIPRNET). Information remains relevant for the global operations and defense of the Marine Corps Enterprise Network (MCEN) as managed by Marine Corps Network Operations and Security Center (MCNOSC) including all Regional Network Operations and Security Centers (RNOSC) and Marine Air Ground Task Force Information Technology Support Center (MITSC) assets and supported Marine Expeditionary Forces (MEF), Supporting Establishments (SE) organizations, and Marine Corps Installation (MCI) commands.

Table 1 depicts the various layers of document design. Each layer has discrete entities, each with their own specific authority when it comes to promulgating documentation. This enterprise

process operates at Level B, sub processes such as procedures and work instructions are not included within the scope of this document.

Table 1. Document Design Layers

	ENTITIES	DOCUMENTS GENERATED
LEVEL A	Federal Govt DoD DoN CMC/HQMC	Statutes/Laws DoD Issuances DoN Policies Marine Corps Orders/IRMS
LEVEL B	HQMC C4 MCNOSC MCSC	MCOs IRMs (Process Guides) Directives MARADMINS
LEVEL C	RNOSC MITSC	Regional Procedures Work Instructions
LEVEL D	MCBs POSTS STATIONS	Locally Generated SOP's

1.3 Document and Process Change Procedures

This document will be reviewed semi-annually for accuracy by the Process Owner with designated team members. Questions pertaining to the conduct of the process should be directed to the Process Owner. Suggested Changes to the process should be directed to USMC C4 CP in accordance with MCO 5271.1C Information Resource Management (IRM) Standards and Guidelines Program.

2.0 PROCESS OVERVIEW

2.1 Purpose, Goals, and Objectives

Request Fulfillment (RqF) is the process for managing Service Requests from users. Service Requests are tracked and managed by the Enterprise or Regional Service Desks (hereafter referred to as Service Desk). The Service Desk will monitor, escalate, dispatch and ensure fulfillment of Service Requests.

The purpose of RqF is to process Service Requests from users.

The goal of RqF is to support USMC IT control objectives and requirements by providing a mechanism for the fulfillment of Service Requests. Service Requests are identified as standard changes, access to a service, questions, complaints, and comments submitted to the Service

Desk. Standard changes are high volume, low risk, low cost changes that have a predefined set of instructions for processing. The Change Management/Advisory Board (CAB) is responsible for designating specific types of changes as standard changes which may be processed without additional CAB approvals. Standard changes may require additional approvals before they can be fulfilled.

Primary objectives of the RqF process include:

- To provide a conduit for USMC users to request and receive services from the Service Catalog for which a predefined approval and fulfillment procedure exists;
- To provide information to MCIE users and customers about the availability of Standard Services and the procedures for obtaining them;
- To source and deliver the Standard Services components from the Service Catalog (e.g., licenses and software applications);
- To assist MCIE users with Enterprise IT Service Management (E-ITSM) general information, complaints or comments.

2.2 Relationships with other Processes

All IT Service Management processes are interrelated. The E-ITSM processes in Figure 2 were selected due to the strength of the relationships and dependencies between them and the degree to which they underpin USMC near-term objectives. While any one of the E-ITSM processes can operate in the presence of an immature process, the efficiency and effectiveness of each is greatly enhanced by the maturity and integration of all E-ITSM processes.

2.2.1 Relationships with other Processes

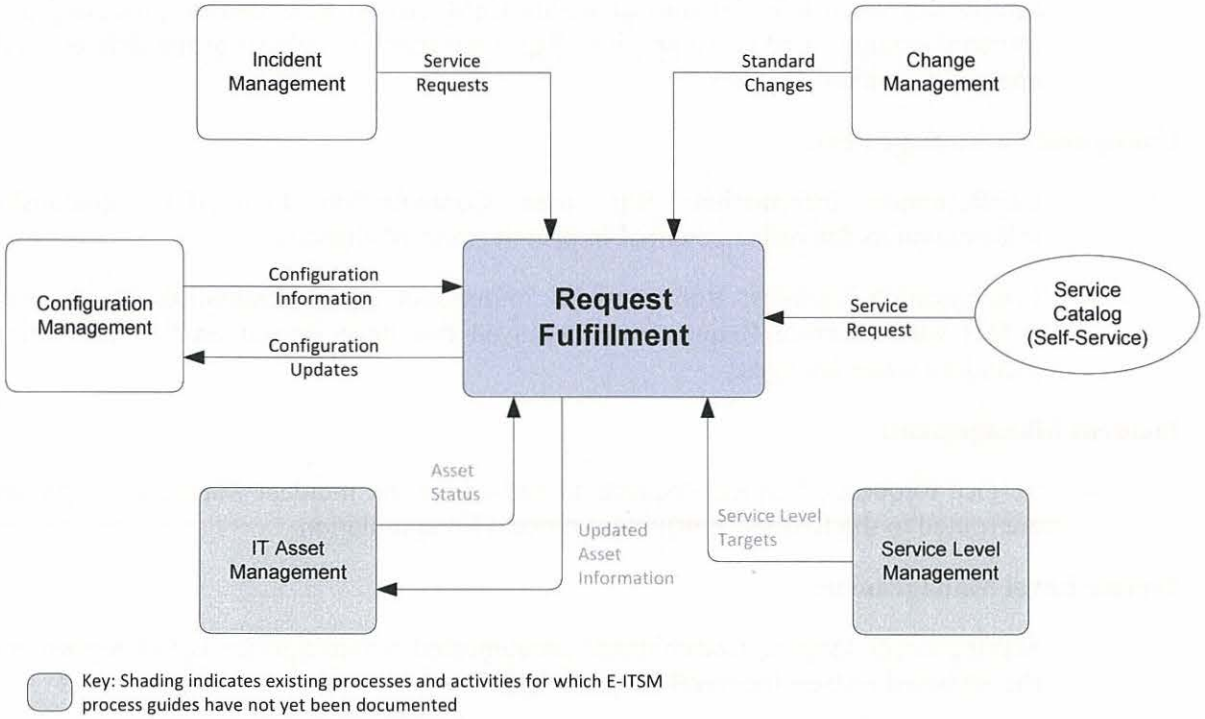

Figure 2: RqF Relationship with other E-ITSM Processes

Service Catalog/Self Service:

- Service Request: Service Requests will come into RqF via various request mechanisms. Depending upon the point of entry, either the Service Desk or the self-service portal routes the service request to the appropriate technical resource or request fulfillment team to fulfill the request.

IT Asset Management:

- Updated Asset Information: The asset information and status is sent to IT Asset Management (ITAM) to update the asset database. ITAM uses RqF updates to determine the lifecycle status of assets.
- Asset Status: Asset Status is obtained from ITAM when a Service Request involves changes that require information such as available inventory of hardware or software licenses.

Change Management:

- Approved Standard Changes: ChM routes Requests For Change (RFC) to Request Fulfillment when it is determined within ChM that an RFC can be processed as a standard change. ChM also provides RqF with specifics related to the defined CAB approved standard changes.

Configuration Management:

- Configuration Information: RqF uses Configuration Item (CI) relationship information to determine potential impact of standard changes.
- Configuration Updates: RqF provides information to Configuration Management (CfM) when Service Requests are deployed that have impact on CI information, including status changes.

Incident Management:

- Service Requests: Service Requests identified via the Incident Management process are routed to the Request Fulfillment process for completion.

Service Level Management:

- Service Level Targets: Commitments documented within Service Level Agreements (SLA) based on Service Level Requirements.

2.3 High-Level Process Model

The RqF process consists of seven distinct sub-processes and is highly integrated with other E-ITSM processes. The following workflow depicts these processes and sub-processes that collectively enable and underpin RqF. See Section 4.0 for complete descriptions of the sub-process activities.

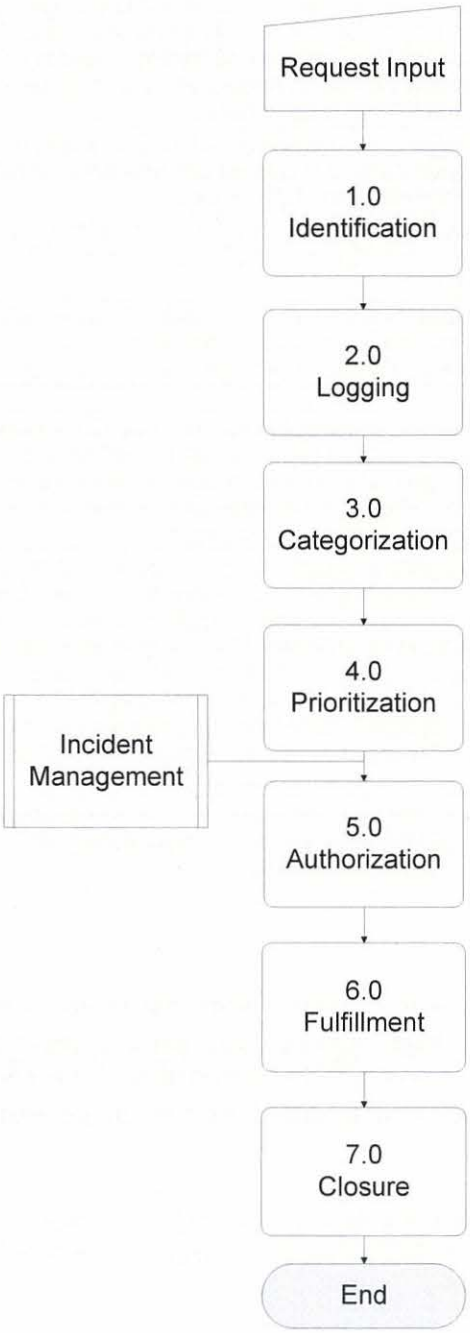

Figure 3: High-Level RqF Workflow

Table 2 below contains descriptions of each sub-process. As appropriate, sub-process numbers are hyperlinked to its detailed description in Section 4.0, Sub-processes.

Table 2: RqF Process Activity Descriptions

Number	Process Activity	Description
1.0	Request Identification	This activity is to identify Service Requests submitted by users through a web-enabled portal, via appropriate interface with the ticketing system or other pre-approved methods. Service Requests submitted through the portal do not flow through Incident Management and therefore need to be identified, logged, categorized and prioritized. Additionally, the portal facilitates many self-help capabilities to fulfill Service Requests.
2.0	Request Logging	Service Requests are logged with a date/time stamp into a RqF tracking tool. A Service Request record is created with relevant information such as the user profile and a description of the request.
3.0	Request Categorization	Categorization identifies the type and nature of the request. Categorization is critical to ensure proper authorizations and routing to the appropriate Fulfillment Resources.
4.0	Request Prioritization	Service Requests are prioritized in relation to other new and existing requests to determine the sequence in which they will be fulfilled. Priority is determined based on Level of Effort or benefit to the organization and Urgency to the requestor.
5.0	Request Authorization	Service Requests entering the RqF process from Incident Management have already been prioritized and are ready for authorization. Categorization, prioritization and user profiles are used to determine the correct level of Authorization. Requests may have functional and/or financial impacts which are factors considered during authorization.
6.0	Request Fulfillment	Service Requests are routed to the appropriate fulfillment team, which follows the documented procedures for fulfilling the request. Certain requests, such as questions or inquiries, may be completed by the Request Administrator, acting as first-line support, while other Service Requests are forwarded to specialist groups and/or suppliers for fulfillment. Procedures and Work Instructions for fulfillment of standard changes are accessed from the a repository, having been previously developed, tested, and documented in ChM and Release and Deployment Management (RDM). A goal of the RqF process is to automate fulfillment activities as much as possible.
7.0	Request Closure	The Request Administrator checks that the Service Request is fulfilled and that the user is satisfied and agrees the Service Request can be closed. The Service Request is then closed.

2.3.1 Process Description

A key purpose of Request Fulfillment is to provide USMC MCIE users an efficient means of handling changes that are low risk, high volume, and have a pre-defined procedure for implementation, which reduces the volume of activity routed through the ChM Process. RqF also provides efficient means of obtaining answers to questions, making general inquiries, and filing complaints.

The scope of the RqF process includes a standard set of processes, procedures, responsibilities, and metrics utilized by all MCIE-related services applications, systems and network support teams.

2.4 Key Concepts

The following key concepts are utilized extensively in this RqF Process Guide:

2.4.1 Approval

Many types of requests require financial, hierarchical, or other organizational approval. In those cases, approval authorities are consulted prior to the delivery of fulfillment actions. Approval requirements for specific Service Requests are pre-defined, documented, and stored with the specific request type procedures.

2.4.2 Commander's Critical Information Requirements

Commander's Critical Information Requirements (CCIR) are the commander's "need to know immediately" information and response requirements. From MCWP 3-40.2 Information Management, "CCIR are tools for the commander to reduce information gaps generated by uncertainties that he may have concerning his own force, the threat, and/or the environment. They define the information required by the commander to better understand the battle-space, identify risks, and to make sound, timely decisions in order to retain the initiative. CCIRs focus the staff on the type and form of quality information required by the commander, thereby reducing information needs to manageable amounts."

2.4.3 Fulfillment Resources

Fulfillment Resources specialize in the fulfillment of specific categories of Services Requests. These resource teams receive the requests from the Request Administrator and maintain communication with the Request Administrator on the status of the request throughout the fulfillment stage of the process.

2.4.4 Service Request

The term 'Service Request' is used as a description for many varying types of demands that are placed upon the IT department by the users. Many of these are actually small changes – low risk, frequently occurring, low cost, etc. (e.g. a request to change a password, a request to install an additional software application onto a particular workstation, a request to relocate some items of desktop equipment) or a question requesting information. However, their scale and frequent, low-risk nature means that they are better handled by a separate, less complex process, rather than being allowed to congest and obstruct the normal Incident and Change Management Processes.

2.4.5 Service Request Status

Service Requests are tracked through the RqF lifecycle. A status designation is used to indicate which stage a Service Request is in as it progresses through the life cycle. This is important for reporting and for Continual Process Improvement. Top-level status designations are shown in Table 3.

Table 3: Request Status Designations

Status	Designation
Assigned	Service Request has been identified, logged, categorized, prioritized, and assigned
Pending	Waiting on input or approval from third party
Approved	Service Request has been authorized (where required)
In-Progress	A fulfillment group is currently working on fulfilling the request
Denied	The request was not authorized for fulfillment
Resolved	Service Request has been fulfilled and is awaiting acknowledgment
Cancelled	Requestor contacts the Request Administrator and cancels the service request
Closed	Service Request record closed

2.4.6 Standard Change

Standard changes are smaller, lower-risk, frequently occurring, lower cost changes (i.e. request to change a password, a request to relocate some items of desktop equipment) that are initiated via the Service Desk. A CAB must approve the designation of a change as a standard change, thus allowing it to subsequently be managed by Request Fulfillment. To be approved, a repeatable procedure for fulfillment must be thoroughly tested and documented.

2.5 Quality Control

2.5.1 Metrics, Measurements and Continual Process Improvement

Continual service improvement depends on accurate and timely process measurements and relies upon obtaining, analyzing, and using information that is practical and meaningful to the process at-hand. Measurements of process efficiency and effectiveness enable the USMC to track performance and improve overall end user satisfaction. Process metrics are used as measurements of how well the process is working, whether or not the process is continuing to improve, or where improvements should be made. When evaluating process metrics, the direction of change is more important than the magnitude of the metric.

Effective day-to-day operation and long-term management of the process requires the use of metrics and measurements. Reports need to be defined, executed, and distributed to enable the managing of process-related issues and initiatives. Daily management occurs at the process manager level. Long-term trending analysis and management of significant process activities occurs at the process owner level.

The essential components of any measurement system are Critical Success Factors (CSFs) and Key Performance Indicators (KPIs).

2.5.2 Critical Success Factors with Key Performance Indicators

The effectiveness and performance of processes are measured using metrics-based KPIs which support high level CSFs. The metrics should be monitored and reported upon in order to judge the efficiency and effectiveness of the process and its operation. To the extent possible, metrics should be broken down by service, customer, priority level, etc. and compared with previous reporting periods.

CSFs are defined as process- or service-specific goals that must be achieved if a process (or IT service) is to succeed. KPIs are the metrics used to measure service performance or progress toward stated goals.

The following CSFs and KPIs can be used to judge the efficiency and effectiveness of the process. Results of the analysis provide input to improvement programs (i.e., continual service improvement).

Table 4 describes the metrics that shall be monitored, measured and analyzed:

Table 4: Critical Success Factors with Key Performance Indicators

CSF #	Critical Success Factors	KPI #	Key Performance Indicators	Benefits
1	Ability to fulfill service requests efficiently and effectively.	1	Number of Service Requests in a defined period by status, location and category.	Increased user satisfaction, timely enablement of business process activity, accurate fulfillment of requests to eliminate rework.
		2	Size and percent (of total number) of the current backlog of outstanding Service Requests reported by status, location and category.	
		3	Average time and/or mean time for approval, fulfillment and closure handling for each type of Service Request. For example, Average Time Fulfillment.	
		4	Number and percent of Service Requests completed within agreed target times.	

CSF #	Critical Success Factors	KPI #	Key Performance Indicators	Benefits
		5	Number and percent of requests fulfilled by status, location, and category.	
		6	User Satisfaction scores obtained via surveys for a defined period.	
2	Agreement on the services that can be requested, who can request them, and the associated costs involved.	1	Number of service requests that are designated as "standard changes" through CAB approval.	Increased efficiency of IT, utilize fewer resources to deliver services at agreed levels.
		2	Number and percent of requests fulfilled by status, location, and category.	Provides an indicator of the number of users seeking types of services requests.
		3	Number and percent of requests rejected due to denial during additional authorization (see sub-process 5.2) by status, location and category.	Provides an indicator of the number of users seeking types of service requests with insufficient privileges.
		4	Cost KPI is to be determined, pending additional financial information.	Indicator of costs related to individual request types.
3	Standard procedures in-place for each type of requested service.	1	Number and percent of Service Requests with associated, documented procedures.	Fulfillment resources do not have to develop method of fulfillment, increased quality of fulfillment results.
4	Integration of front-end self-help tools with the back-end processes.	1	Number and percent of requests resolved through self-help capability.	Increase productivity of IT and consistent quality of fulfillment through automation.

Other qualitative factors to consider:

- Agreements of what services are available and who is authorized to request them.
- Publication of the services to users as part of the Service Catalog. The Service Catalog should be kept accurate and up to date to reflect available service offerings and support request fulfillment approvals and workflows.
- Definition of a standard fulfillment procedure for each of the services being requested. This includes all procurement policies and the ability to generate purchase orders and work orders.
- A single point of contact which can be used to request the service. Users have the ability to submit a Service Request via phone call, email, web-enabled portal, fax, in person, and direct entry to the request system (via tool or web for operations personnel).
- Self-service tools needed to provide a front-end interface to the users. It is essential that these tools integrate with the back-end fulfillment tools.
- Customer/User satisfaction surveys will be conducted by Service Desk agents after the service request is fulfilled. Care should be taken to limit the number of questions to reduce impact on time spent by users completing the surveys. Survey questions must be carefully designed in a way to collect the desired data. Survey design is a specialized discipline that requires a good understanding of statistics and survey techniques.

3.0 GOVERNANCE

Governance deals with the authority and accountability for directing, controlling and executing IT services. IT governance involves creating the governing principles. This includes:

- Who makes directing, controlling, and executing decisions
- How the decisions are made
- What information is required to make the decisions
- What decision making mechanisms should be required
- How exceptions are handled
- How the governance results should be reviewed and improved

Enterprises have always strived for effective administration, direction and control. However, there is an increased focus on IT governance because of federal regulations related to privacy, anti-terrorism, security and other factors.

IT governance encompasses the organizational structures and IT management processes used to sustain and extend strategies and objectives. Clearly defining roles and responsibilities within each process is a critical activity of IT governance for the USMC. By introducing controlled governance, the level of transparency and accountability within IT operations is improved, thereby reducing risks while linking IT goals with USMC mission accomplishment.

The USMC has established the Enterprise Service Management Governance Board (ESMGB) to provide a collaborative governance of the ongoing, development, deployment, delivery and maintenance of E-ITSM solution. The ESMGB serves as an IT advisory forum to the CIO ensuring the IT requirements of all Service Management capabilities are addressed and supported by the IT enterprise infrastructure.

3.1 Roles and Responsibilities

Each process has roles and responsibilities associated with design, development, execution and management of the process. A role within a process is defined as a set of responsibilities. Process managers report process deviations and recommended corrective action to the respective process owner. Authoritative process guide control is under the purview of the process owner. The process owner for RqF is from the USMC C4 organization.

Management (i.e., responsibility) of a process may be shared; generally, a single manager exists at the MCNOSC enterprise and at each MITSC. For certain processes, especially those within Service Design and Service Transition, managers also exist within Marine Corps Systems Command and Programs of Record. Some Service Operation processes will require managers at the RNOSC. RNOSC is responsible for Situational Awareness (SA) to the Marine Corps forces G6 in addition to responsibilities outlined in the SIPRNet Concept of Employment (COE). There can also be instances where a single person is responsible for multiple roles. Factors such as Area of Responsibility (AOR), size of user base and size of the process support team dictate exactly which roles require a dedicated person(s) and the total number of persons performing each role. This process guide defines all *mandatory* roles.

3.1.1 Roles

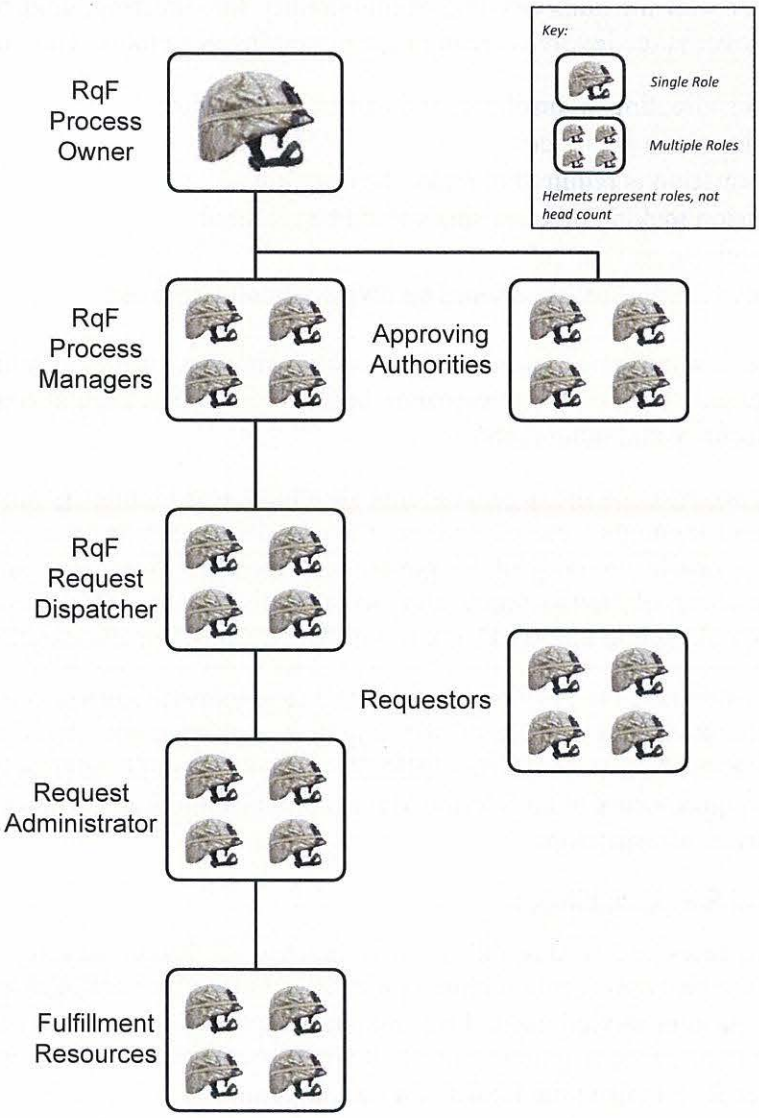

Figure 4: RqF Roles

Table 5: RqF Defined Roles and Responsibilities

Description	Overall Responsibility
Role #1 RqF Process Owner	
The Process Owner owns the process and the supporting documentation for the process. The primary functions of the Process Owner are oversight and continuous process improvement. To these ends, the Process Owner oversees the process, ensuring that the process is followed by the organization. When the process isn't being followed or isn't working well, the Process Owner is responsible for identifying and ensuring required actions are taken to correct the situation. In addition, the Process Owner is responsible for the approval of all proposed changes to the process, and development of process improvement plans.	• Reviews and understand all references pertaining to process ownership • Documents and publicizes the process • Establishes and communicates the process roles and responsibilities • Ensures updates to the Process Guide are performed according to the Change Management Process • Defines the Key Performance Indicators (KPIs) to evaluate the effectiveness and efficiency of the process • Reviews KPIs and taking action required following the analysis • Assist with and being ultimately responsible for the process design • Ensures RqF processes and tools integrate with other ITSM processes and that requirements for the tools are defined • Ensure the effectiveness and efficiency of the Request Fulfillment Process and working practices through continuous improvement • Reviews any proposed enhancements to the process • Provides input to the ongoing Service Improvement Plan • Address any issues with the execution of the process • Ensures all relevant staff have the required training and are aware of their role in the process • Ensures that the process, roles, responsibilities and documentation are regularly reviewed and audited • Interfaces with appropriate organizations to ensure that the process receives the necessary staff resources • Ensure all stakeholders are sufficiently involved in the Request Fulfillment Process • Ensures tight linkage between the Request Fulfillment Process and other related processes • Ensure organizational adherence to the process
Role #2 RqF Process Manager	
The Request Fulfillment Manager ensures effective coordination of activities to fulfill user requests. The RqF Manager manages and coordinates all activities necessary to identify, log, route for approval (where required), fulfill and close requests. RqF Managers will communicate and coordinate with their counterparts on requests or the process when required/beneficial.	• Maintains awareness of USMC and DoD directives • Interfaces with various enterprise, regional and local representatives to monitor effectiveness of RqF process • Develops, documents and follows up on action plans • Provides data on escalation history managing requests for information regarding escalations • Schedules and facilitates escalation meetings and phone conferences • Plans work to be accomplished by subordinates, setting priorities and scheduling completion. Assigns work to subordinates based on priorities and selective considerations of the difficulty of assignments and capabilities of employees • Resolves escalation and routing conflicts • Tactical role that performs end-to-end implementation of the Request Fulfillment process • Reviews effectiveness and efficiency of the RqF Process execution at their level of the enterprise • Ensures that the process is executed at their level • Verify utilization of a request tracking system at the appropriate level • Maintains contact with other groups and organizations performing related work and coordinates new ideas and developments • Reviews requests not fulfilled through the standard RqF Process

Description	Overall Responsibility
Role #3 RqF Request Dispatcher	
The Request Dispatcher ensures effective coordination of activities to fulfill requests with a primary focus on escalations, prioritizations, routing and queue management.	• Awareness of USMC and DoD directives • Ensures service requests are accurately transferred and/or escalated to the appropriate Resolution Team • Requests, reviews, and report metric performance • Assists the support engineers through the Service Request process within their domain • Identifies opportunities to improve the process
Role #4 Request Administrator	
The Request Administrator interfaces with the Customer as the initial point of contact for Request Fulfillment. The Request Administrator owns the request records he or she generates. As the record owner, the Request Administrator tracks all record activities/statuses remaining the single point of contact for the customer throughout the lifecycle of the record.	• Receives the request • Authenticates the requestor information (check information in the Global Address List, confirm location, etc.) • Creates a Service Request record in the Service Request Control system if the record does not already exist • Categorizes the record • Applies procedures applicable to the requestor and categorization • Qualifies request record • Prioritizes the request record • Transfers the request record to the appropriate Resolution Team • Knowledgeable of the service level requirements and executes the procedures accordingly • Provides technical communication to customer when needed for informational requests • Uses available resources to fulfill request types identified for completion • Communicates the status and completion to the user/external help desk and other staff/interested parties • Once a request is fulfilled, ensures the customer agrees that the request has been met. Either closes the record or returns the record to the Request Dispatcher or Manager for further work • Informs procedure owners if issues are detected in procedures
Role #5 Fulfillment Resources	
Fulfillment Resources specialize in the fulfillment of specific categories of Services Requests. These resource teams receive the requests from the Request Administrator and maintain communication with Request Administrator on the status of the request throughout the fulfillment stage of the process.	• Provides all facets of support concerning the fulfillment of specialized categories of service requests. • Maintains and updates work instruction level documentation specific to the fulfillment of their specific category of service request • Fulfills service requests • Updates where necessary IT asset management information • Understands the service level and executes accordingly • Provides technical communication to customer/caller regarding quick fixes • Uses available resources to fulfilling requests (people, tools and processes), escalating as needed • Provides knowledge and training as required to other support teams
Role #6 Approving Authorities	
Approving Authorities grant or deny permission for Service Requests. They are identified with each Service Request type. Identification and routing instructions for Approving Authorities is included within the procedures for each type of request.	• Approving Authority role is particular to a request type • Approving Authority for a request type is identified in the request handling procedures and routing instructions • Approving Authorities provide and/or deny Request Authorization for their request type(s) • Provide response information within the request system as defined within the Authorization response routing instructions

Description	Overall Responsibility
Role #7 Requestor	
Requestors are users requiring specific services available via Request Fulfillment.	• Contact Service Desk to submit individual requests to support the creation of the request record, or • Utilize automation (web-access) to submit individual requests and complete necessary request record information • Utilize automation (web-access) to obtain status • Provide verification of fulfillment • Provide feedback via survey

3.1.2 Responsibilities

Processes may span departmental boundaries; therefore, procedures and work instructions within the process need to be mapped to roles within the process. These roles are then mapped to job functions, IT staff and departments. The process owner is accountable for ensuring process interaction by implementing systems that allow smooth process flow.

The Responsible, Accountable, Consulted, Informed, Participant (RACI-P) model is a method for assigning the type or degree of responsibility that roles (or individuals) have for specific tasks.

Responsible – Completes the process or activity; responsible for action/implementation. The degree of responsibility is determined by the individual with the "A".

Accountable – Approves or disapproves the process or activity. Individual who is ultimately answerable for the task or a decision regarding the task.

Consulted – Gives needed input about the process or activity. Prior to final decision or action, these subject matter experts or stakeholders are consulted.

Informed – Needs to be informed after a decision or action is taken. May be required to take action as a result of the outcome. This is a one-way communication.

Participant –Assists 'R' in the execution of the process and/or activity.