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3000 MARINE CORPS PENTAGON
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Subj: ENTERPRISE INFORMATION TECHNOLOGY SERVICE MANAGEMENT REQUEST FULFILLMENT MANAGEMENT PROCESS GUIDE

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Encl: (1) IRM-2300-08B Enterprise Information Technology Service Management Request Fulfillment Process Guide

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 Enterprise Network (MCEN). 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. 2300-08A.

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

4. APPLICABILITY. This publication is applicable to the Marine Corps Total Force.

5. SCOPE.

a. Compliance. Compliance with the provisions of this publication is required unless a specific waiver is authorized.

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

6. SPONSOR. The sponsor of this technical publication is HQMC C4 CP.

K. J. NALLY
Brigadier General
U.S. Marine Corps
Director, Command, Control,
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Enterprise IT Service Management
Request Fulfillment
Process Guide

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Table of Contents

List of Tables

List of Figures

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 Enterprise Network (MCEN). 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 1-1.

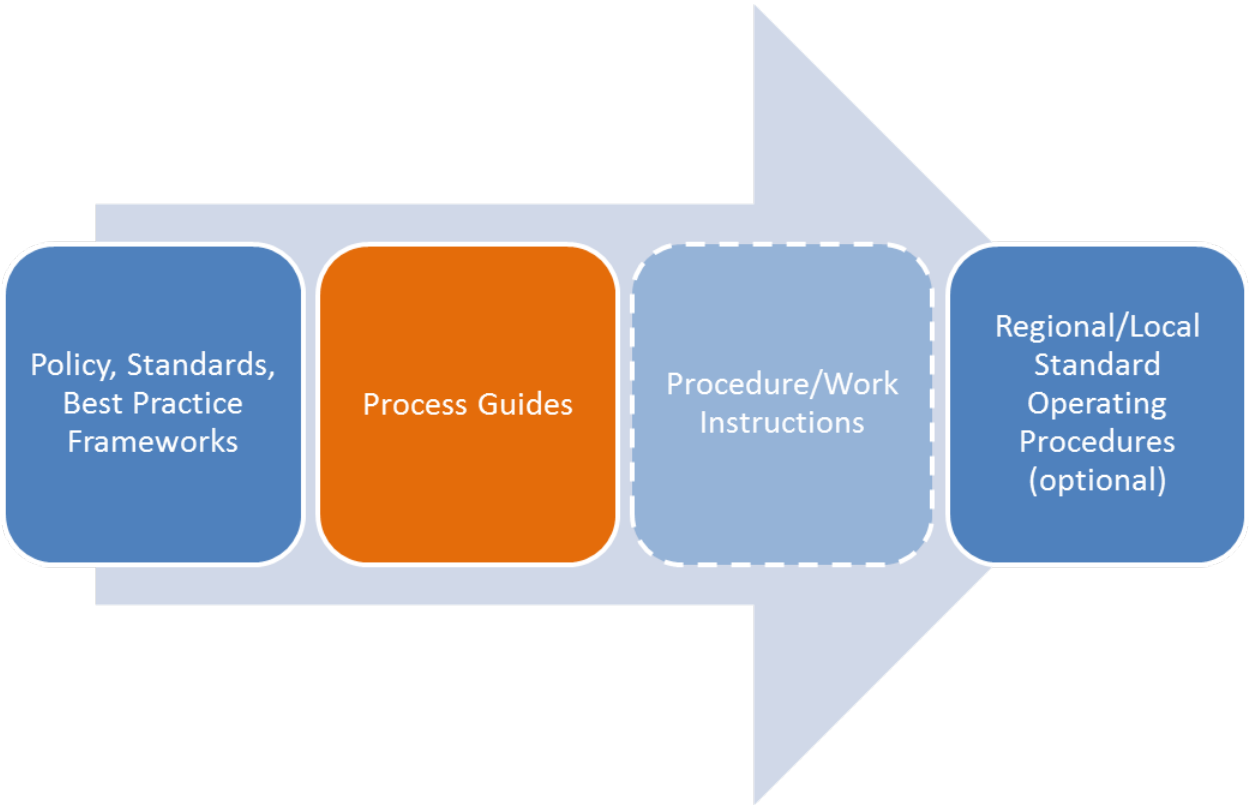


Figure 1-1 Process Document Continuum

1.2 Scope

The scope of this document covers all services provided in support of the MCEN 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 1-1 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 1-1: 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 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 MCEN 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 MCEN 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

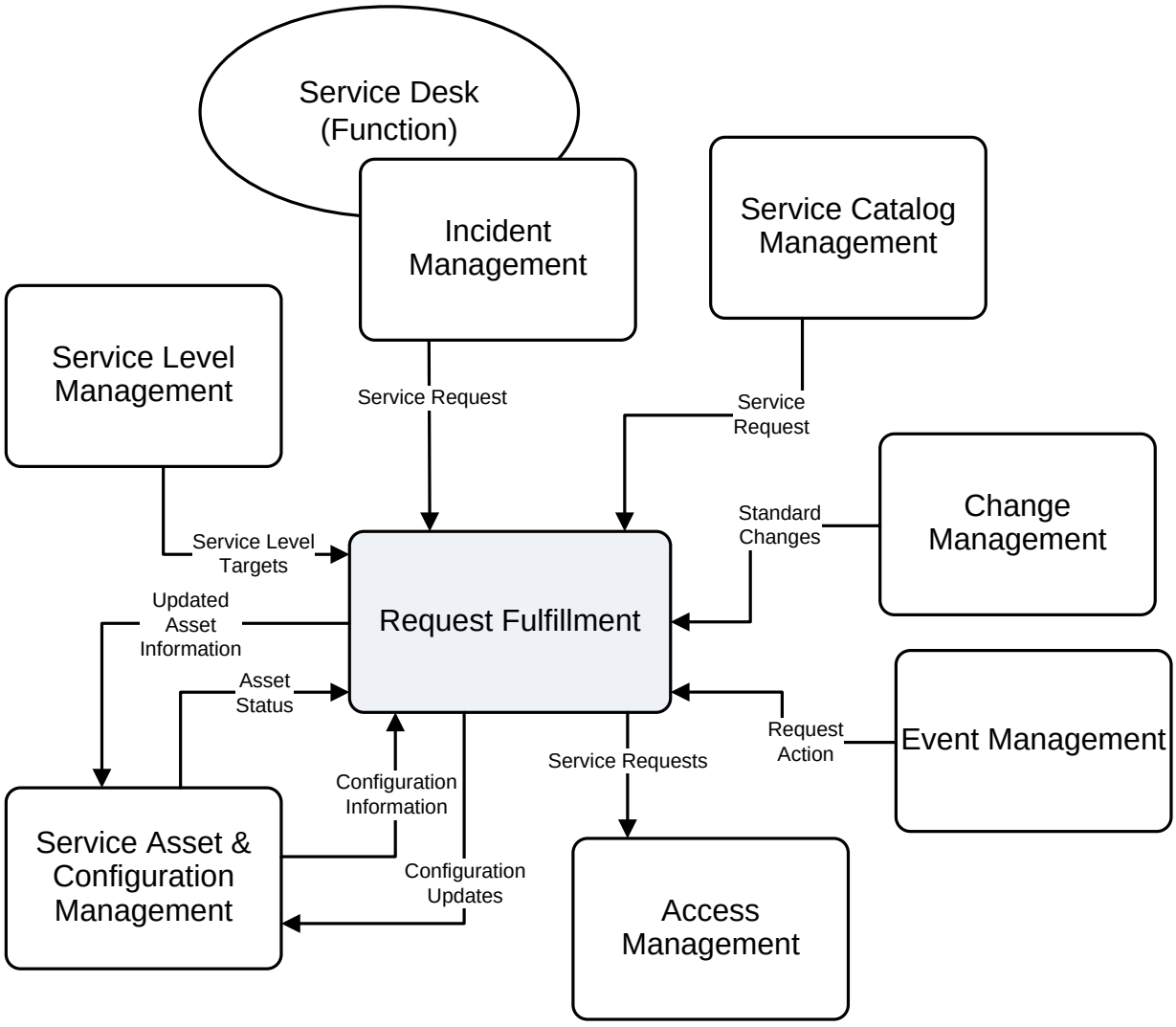


Figure 1: RqF Relationship with other E-ITSM Processes

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.

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.

Service Asset & Configuration Management:

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

Access Management:

- Service Requests: Service Requests for access to systems and applications are identified by Request Fulfillment and routed to Access for completion.

Event Management:

- Events that require Request Action will be routed from Event Management to Request Fulfillment for completion.

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.

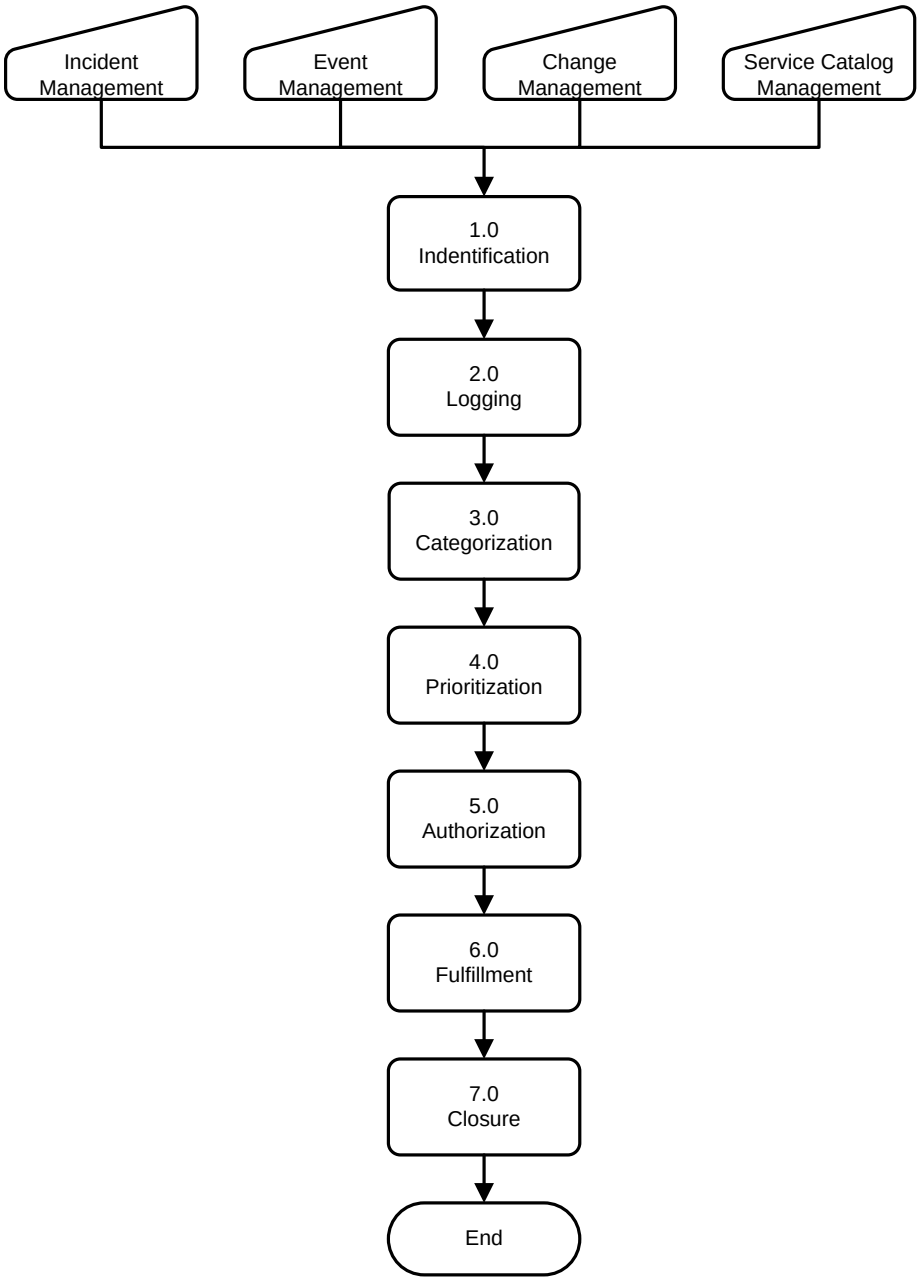


Figure 2: High-Level RqF Workflow

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	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	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	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	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	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	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	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 MCEN 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 MCEN-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. Service Requests can be initiated via phone call, e-mail, 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 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 Roles

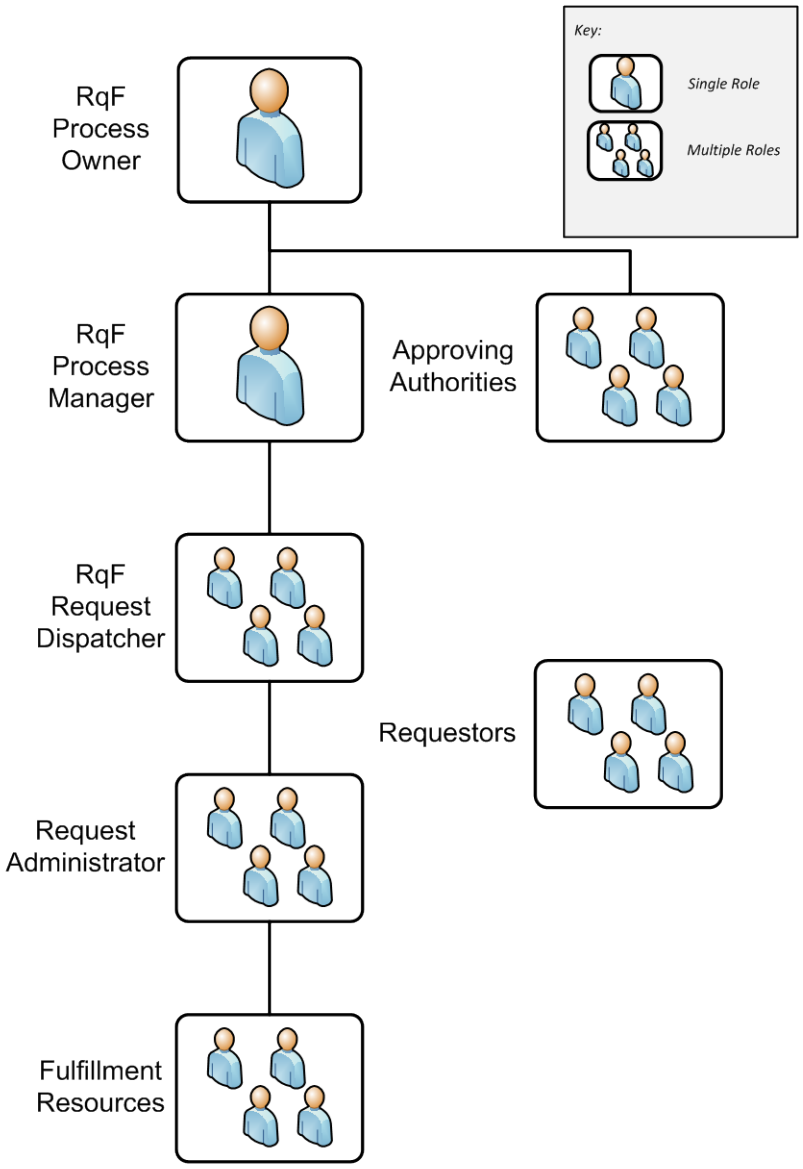


Figure 3: RqF Roles

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 MITSC Queue Manager	
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 (CTR/ISC)	
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

3.2 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.

Table 5A establishes responsibilities for high-level process activities by organization.

Table 5A: Responsibilities for Enterprise RqF Organizations

RqF Process Activities	Requestor	Service Desk	MCNOSC	RNOSC	MCSC	MITSC	Base	USMC C4
Identification	(R)P	(R)	P			P	P	A
Logging	(R)C	(R)	P	C		C	C	A
Categorization	I	R	P	C		C	C	A
Prioritization	C	R	P	C		C	C	A
Authorization*	I	P	(R)P	(R)C	(R)C	(R)C	(R)C	A(R)C P
Fulfillment*	I	(R)	(R)P	(R)P	(R)P	(R)P	(R)P	A
Closure	C	R	P					A

***** *Authorization and Fulfillment Responsibilities varies by Request and, therefore, the Responsible roles may fall within any one of the listed organizations for fulfillment depending upon the type of request.*

Legend:
Responsible (R) – Completes the process or activity. Only one Role will be responsible for an activity. The (R) indicates that Responsibility will vary depending upon the request type and could fall within any of the designated columns.
Accountable (A) – Authority to approve or disapprove the process or activity
Consulted (C) – Experts who provide input
Informed (I) – Notified of activities
Participant (P) – Assists in execution of process or activity

Note: Any department that is designated as Responsible, Accountable, Consulted, or Participant is not additionally designated as Informed because being designated as Responsible, Accountable, Consulted, or Participant already implies being in an Informed status.

Note: Only one department can be accountable for each process activity.

Table 5B establishes process role responsibilities for high-level process activities as they relate to process roles. Process roles transcend organizational boundaries; therefore a role based RACI-P chart ensures proper assignment of responsibilities to individuals.

Table 5B: Responsibilities for Enterprise RqF Roles

RqF Process Activities	Requestor	RqF Process Owner	RqF Process Manager	RqF Request Dispatcher	Request Administrator	Fulfillment Resources	Approving Authorities
Identification	(R)P	A	P		R		
Logging	(R)C	A	P	I	R		
Categorization	I	A	P	I	R		
Prioritization	C	A	P	P	R		C
Authorization	I	A	P	C	P		R
Fulfillment	I	A	P	P	P	R	I
Closure	C	A	P	I	R		

Legend:
Responsible (R) – Completes the process or activity. Only one Role will be responsible for an activity. The (R) indicates that Responsibility will vary depending upon the request type and could fall within any of the designated columns.
Accountable (A) – Authority to approve or disapprove the process or activity
Consulted (C) – Experts who provide input
Informed (I) – Notified of activities
Participant (P) – Assists in execution of process or activity

Note: Any department that is designated as Responsible, Accountable, Consulted, or Participant is not additionally designated as Informed because being designated as Responsible, Accountable, Consulted, or Participant already implies being in an Informed status.

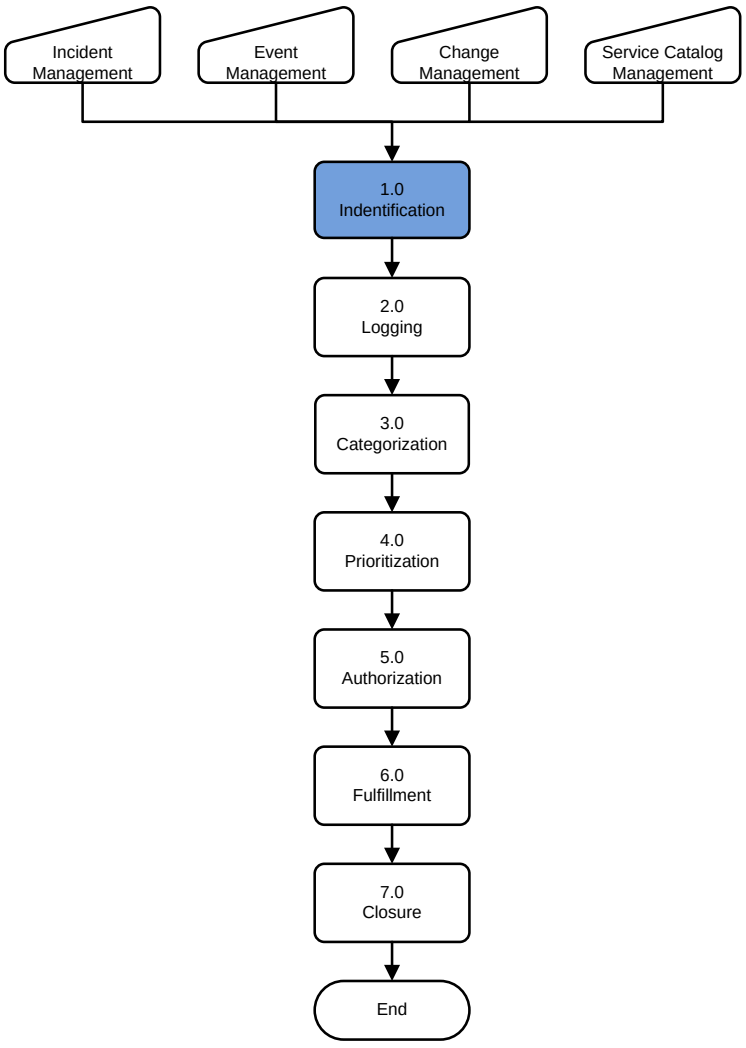
Note: Only one department can be accountable for each process activity.

4.0 SUB-PROCESSES

The USMC RqF process consists of seven sub-processes. While every Service Request will follow each sub-process on some level, not every activity within each sub-process is utilized for every USMC organization or type of Service Request.

4.1 Identification

Identification is the activity of determining how the Service Request is to be routed within the Request Fulfillment process. The RqF process is triggered through request inputs from the Service Catalog. The Service Request ticket is opened to capture the requestor's pertinent information (i.e., name, location and contact information) and a description of the Service Request. The Service Request is identified as pertaining to the Classified (SIPRNet) or Unclassified (NIPRNet) ticketing system.



The following workflow (Figure 4) depicts the Identification sub-process.

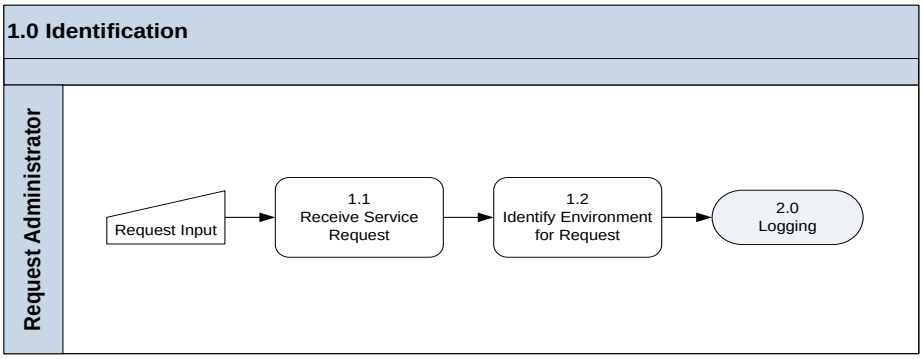


Figure 4: Identification Sub-Process

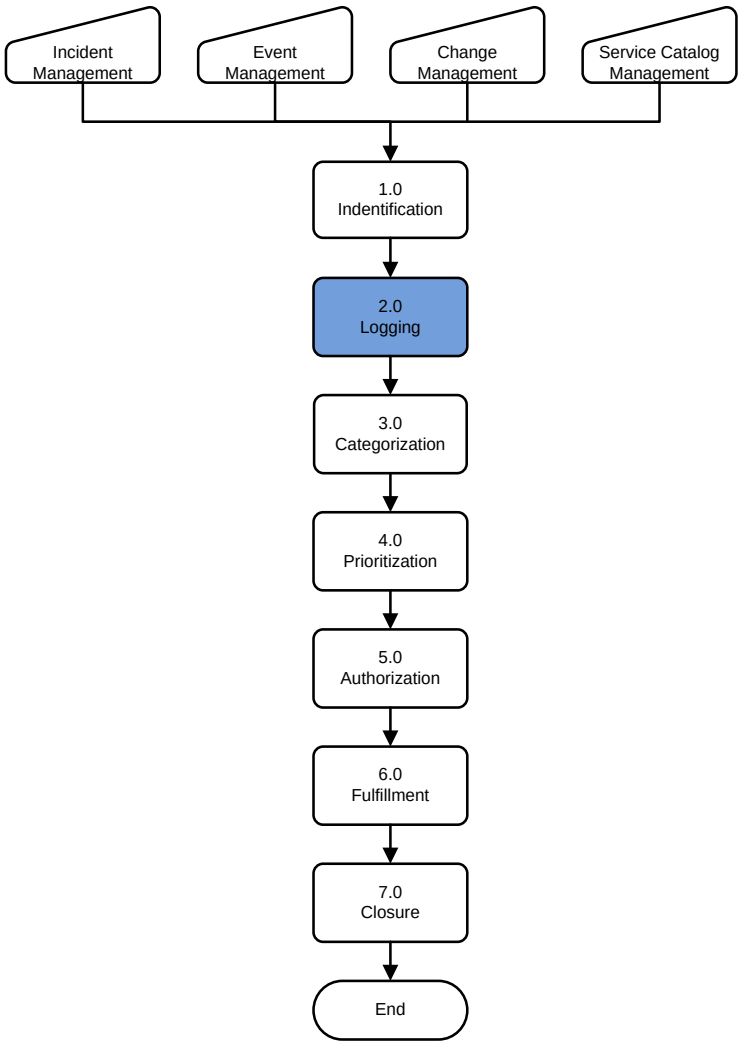
Table 6 describes the Identification sub-process steps as depicted in Figure 5.

Table 6: Identification Sub-Process Descriptions

1.0 Identification		
Number	**Process Activity**	**Description**
1.1	Receive Service Request	Service Requests can be initiated via phone call, e-mail, in person, and direct entry to the request system (via tool or web for operations personnel). The Identification sub-process is triggered when a Service Request is submitted and the Request Administrator begins identification.
1.2	Identify Environment for Request	Determine if the Service Request applies to the NIPR or SIPR networks for requests that do not originate through a portal or a catalog. Requests submitted through a portal or catalog will already have a SIPR or NIPR designation.

4.2 Logging

Once a Service Request has been identified it is logged in the request management system. Information about the requestor must also be added to the request record so that prioritization, authorization and fulfillment can be completed in the most efficient manner. The accuracy and completeness of Logging is also critical to reporting, tracking, and service management.



The following workflow (Figure 5) depicts the Logging sub-process.

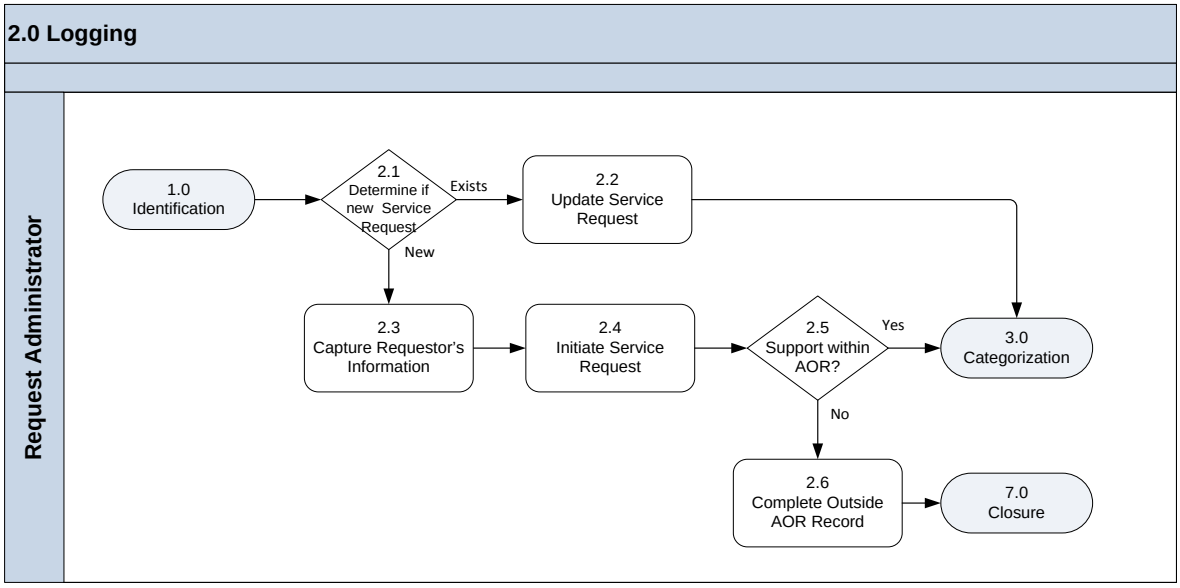


Figure 5: Request Logging Sub-Process

Table 7 describes the Logging sub-process steps as depicted in Figure 6.

Table 7: Logging Sub-Process Descriptions

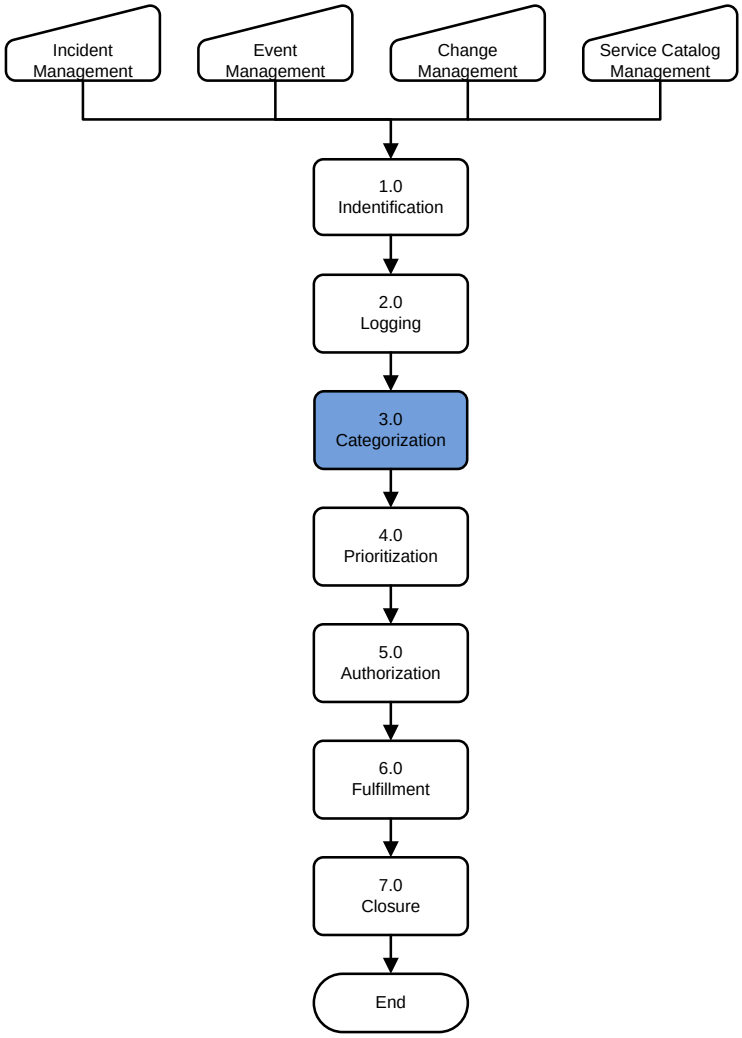
2.0 Logging		
Number	**Process Activity**	**Description**
2.1	Determine if New or Existing Request	The Request Administrator determines if this a new or existing Service Request 1. New: If this is a new request, then continue to capture requestor's information. 2. Exists: If this is an existing request, then proceed to update Service Request.
2.2	Update Service Request	The Request Administrator reviews and updates the existing Service Request.
2.3	Capture Requestor's Information	The Request Administrator captures the requestor's name, location and contact information, and a description of the Service Request. In addition, there is a method to verify which user is receiving the service.
2.4	Initiate Service Request	Any information that has been collected by the Request Administrator is formally initiated in a record and a specific request record number is assigned.
2.5	Support within AOR?	The Request Administrator determines if the inquiry is within the MCEN Area of Responsibility (AOR) and updates the Customer on the next step. 1. Yes: If within AOR, then proceed to Request Categorization. 2. No: If not within AOR, then proceed to Complete Outside AOR Record.
2.6	Complete Outside AOR Record	The Request Administrator updates the requestor on the next step in the process, completes the Service Request using the

2.0 Logging		
Number	**Process Activity**	**Description**
		Outside AOR template, and routes to Request Closure.

Consult Appendix D: RqF System Record Attributes for a complete listing of logging attributes.

4.3 Categorization

Service Request Categorization is conducted to facilitate correct and timely authorization, fulfillment and accuracy in reporting. Categorization identifies the IT Service to which the request is associated. The IT Service has predefined routing instructions, authorization contacts, and fulfillment procedures that are associated with the related request category. These services are related to specific product and operational categories, or request for information, comments and complaints. Additionally, categorization is corrected when necessary throughout the lifecycle of the service request to ensure proper routing and accuracy in reporting.



The Marine Corps product categorization structure contains three tiers designed to quickly and accurately identify technologies, manufacturers, products, versions, and configuration items.

Operational categories define the work for particular types of Service Requests and their related tasks.

The Marine Corps operational categorization is a three-tier structure used to enable quality reporting in the record system, to qualify groups and support staff assignments and to manage the routing for authorization.

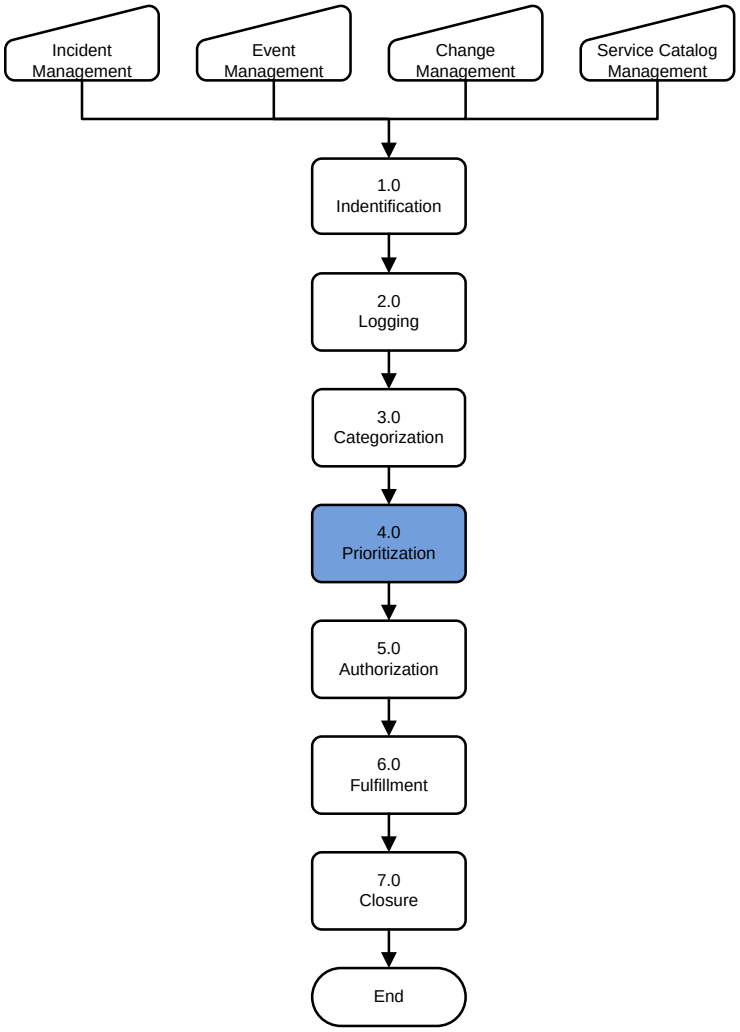
Table 8 provides an example of possible categorization options.

Table 8: Service Request Categorization Example

Operational Categorization		
Tier 1	**Tier 2**	**Tier 3**
Service Request	Move	Same Building
		Different Building
	Add/Install	Approved Hardware
		Unapproved/Non-Standard Hardware
	Change Existing	
	Replace/Swap	Improve Utility or Performance
		Lemon – Previous Issues
	Decommission	
	Training/How-To	
	Request New Category	

4.4 Prioritization

Service Request prioritization is based upon several components of which one is service level objectives. These objectives must be defined within the specific Service Level Agreement for each request type. Service Level Objectives, once defined, will establish time boundaries that may impact prioritization. The Prioritization sub-process is used to determine the sequence of fulfillment. Before a priority can be assigned, the Urgency and Level of Effort (LOE) required to fulfill the request must be determined. Urgency and LOE are the primary considerations in assigning a priority to the Service Request.



Urgency is defined as the requestor's desired timeframe to fulfill the request and may be elevated after management review. Urgency, within the 4.0 Prioritization activity, is defined as the requestor's desired timeframe to fulfill the request and is composed of three distinct levels (from lowest to highest): Routine, Elevated, and Review. Routine and Elevated can be assigned by the requestor, but Reviewed is the highest level of Urgency and will be assigned after a review by a Request Fulfillment Process Manager.

Other relevant aspects of Urgency to consider include, but are not limited to:

- VIP status of the end requestor of the service
- Time Sensitive – Is a critical deployment or tactical operation underway?
- As greater levels of detail are available for types of requests, then more specific Urgency definitions can be provided for each type of Service Request.

Table 10 provides general guidance for establishing Service Request Urgency at the enterprise level under "normal" operating conditions.

LOE provides a measure for assessing the amount of preparation and work required to fulfill a service request. By determining the LOE required for each request, the appropriate amount of fulfillment resources can be identified. When LOE and Urgency are used to determine the initial

priority, applying any contractually required SLAs to the Service Requests assures the most accurate Priority assignment. The resulting Prioritization for the Service Request may be adjusted based on management review.

Table 11 provides general guidance for identifying the LOE for the Service Request.

The following workflow (Figure 6) depicts the Prioritization sub-process.

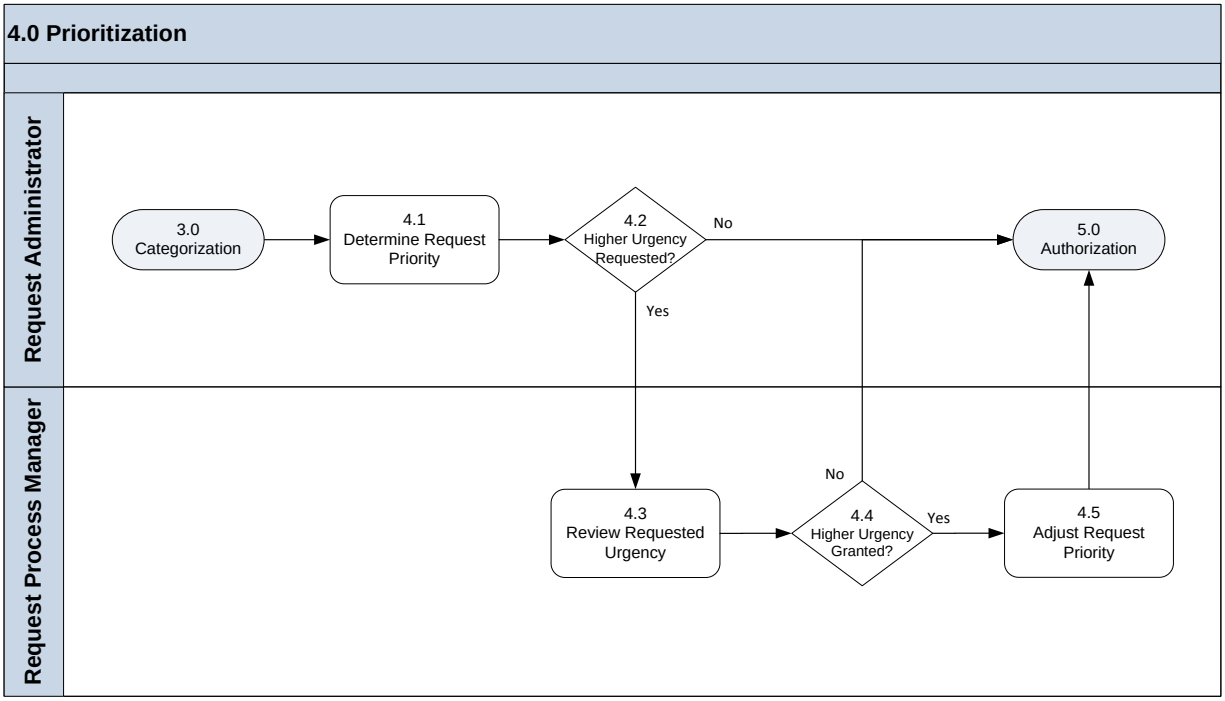


Figure 6: Prioritization Sub-Process

Table 9 describes the Prioritization sub-process steps as depicted in Figure 7.

Table 9: Prioritization Sub-Process Descriptions

4.0 Prioritization		
Number	**Process Activity**	**Description**
4.1	Determine Request Priority	The Request Administrator utilizes the requestor's input to determine Urgency and the request type. Only Routine and Elevated Urgency are allowed at the point of entry unless the requestor has VIP status. The Request Administrator assigns a Level of Effort status based upon the level designated for the Service Request type as defined within the procedures for that type. An initial Prioritization is derived based upon the Urgency, the LOE, and the VIP status of the requestor.

4.0 Prioritization		
Number	**Process Activity**	**Description**
4.2	Higher Urgency Requested?	If the user requests a review for potential higher priority, then the Service Request is sent to an RqF Process Manager for review. 1. Yes: The user requests a higher level of Urgency. Proceed to review request priority. 2. No: The user does not request a higher level of Urgency. Proceed to Request Authorization with the established Priority.
4.3	Review Requested Urgency	The MITSC Queue Manager reviews the requested higher level of Urgency based upon the request type and requestor's input.
4.4	Higher Urgency Granted?	The MITSC Queue Manager determines if elevated Urgency is required. 1. Yes: The request proceeds to adjust request priority. 2. No: The request retains its assigned level of Urgency and resulting Priority. The request proceeds to Request Authorization.
4.5	Adjust Request Priority	The request is assigned a higher Urgency and resulting Priority. The request proceeds to Request Authorization.

Table 10: Urgency

RqF Urgency	
Level	**Description**
Reviewed / VIP	o Management approves the additional elevation of the Request Urgency -Or- o The requestor is a VIP and warrants additional elevation of the Request Urgency
Elevated	o The requestor indicates that fulfillment of the Service Request is of greater Urgency -Or- o Operational constraints or requirements indicate that elevated Urgency is required
Routine	The requestor indicates that fulfillment is of routine Urgency

Table 11 provides guidance for establishing the LOE necessary to fulfill a Service Request at the enterprise level, under "normal" operating conditions. The more specific LOE for lower echelons, MITSCs, bases, and commands, is determined at the time of implementation.

Table 11: Level of Effort

RqF Level of Effort	
Level	**Description**
High 72 labor hours or more to complete	o The fulfillment of the request requires a high amount of planning and effort to complete -Or- o The requested service is defined as having a High LOE in the fulfillment procedure
Medium 24 – 72 labor hours to complete	o The fulfillment of the request requires a moderate amount of planning and effort to complete -Or- o The requested service is defined as having a Medium LOE in the fulfillment procedure

RqF Level of Effort	
Level	**Description**
Low 0 – 24 labor hours to complete	o The fulfillment of the request requires low or no planning and a little effort to complete -Or- o The requested service is defined as having a Low LOE in the fulfillment procedure

By evaluating the urgency and LOE, it is possible to assign priority to the Service Request, as shown in Table 12.

Table 12: Priority Matrix

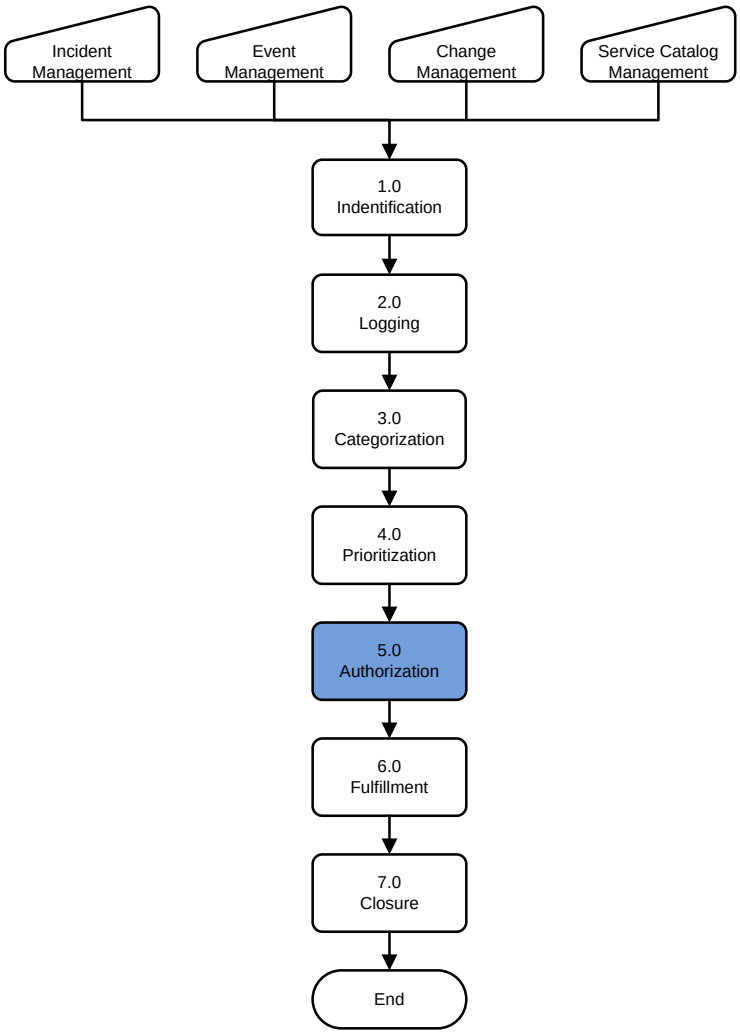
URGENCY	LEVEL OF EFFORT			
		Low 5	Medium 3	High 0
	Reviewed/VIP 15	High 20	High 18	Medium 15
	Elevated 10	High 15	Medium 13	Medium 10
	Routine 0	Low 5	Low 3	Low 0

The request management tool assigns a standard weighting to each combination of urgency and LOE. The overall priority can be adjusted by increasing or decreasing this weighting without having to modify the actual LOE and urgency values. The priority may also be adjusted by the approval authority. This is the appropriate method for adjusting the priority as the actual urgency and LOE should be accurately reflected in the request records.

Given the multitude of variables inherent to USMC operations that can affect LOE, different echelons or commands can have unique LOE and urgency criteria that will be established at the time of implementation. It is the responsibility of Request Fulfillment Process Managers and Request Dispatchers at all levels of the organization, to review incoming Service Requests to ensure priorities are accurately set and to make adjustments when appropriate.

4.5 Authorization

Authorization is the sub-process that enables appropriate decision making for a specific service request. Many types of service requests require financial, hierarchical, or other organizational approval before the request can be fulfilled. The category of the Service Request and the identity of the requestor are used to determine if authorization is required prior to fulfillment. In those instances, authorization roles are consulted before the request enters the Fulfillment sub-process. Approval requirements for specific Service Requests are pre-defined, documented, and stored with the specific procedures for that request type.



The following workflow (Figure 7) depicts the Authorization sub-process.

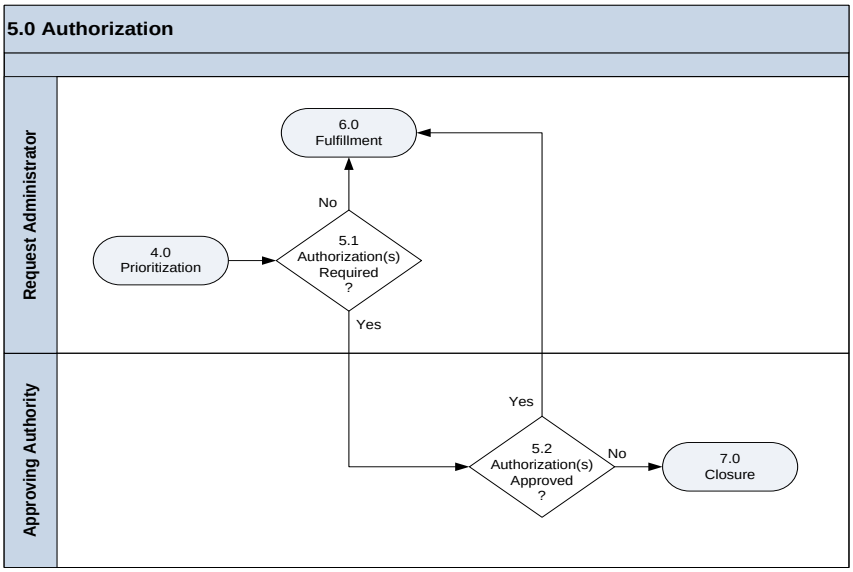


Figure 7: Authorization Sub-Process

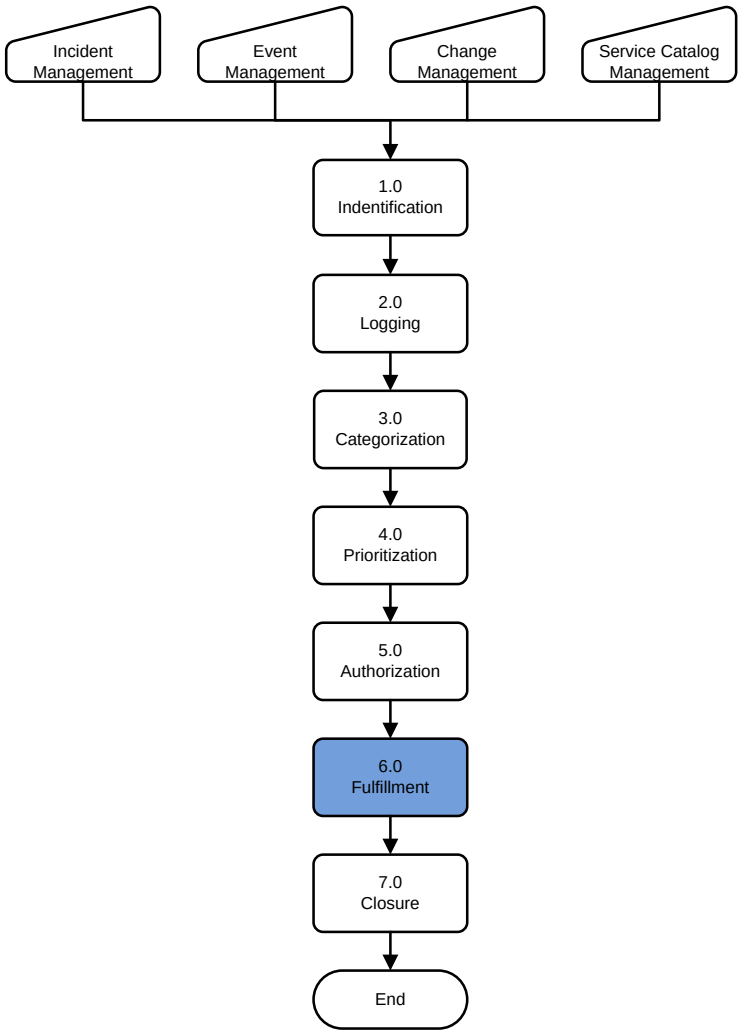
Table 13 describes the Fulfillment sub-process steps as depicted in Figure 8.

Table 13: Authorization Sub-Process Descriptions

5.0 Authorization		
Number	**Process Activity**	**Description**
5.1	Authorization(s) Required?	The type and categorization of the request as well as the identity of the user is used to determine if authorization is required prior to fulfillment. 1. Yes: If authorization is required, then proceed with routing for approval. Requests requiring authorization are routed to the predefined approving authorities for decision. 2. No: If authorization is not required, then proceed to Request Fulfillment.
5.2	Authorization(s) Approved?	One or more predefined authorities are consulted for decision on authorization to proceed with fulfilling the request. These authorities are defined within the instructions for each request type requiring authorization. 1. Yes: If authorization is granted, then proceed to Request Fulfillment. 2. No: If authorization is not granted, then the request administrator informs the requestor of the denial of the request by the approving authority. The request is routed to Request Closure.

4.6 Fulfillment

The Request Fulfillment activity delivers the authorized service, component and/or information to the requestor. The actual fulfillment activity depends on the categorization of the Service 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 the fulfillment of standard changes are accessed from a controlled repository, having been previously developed, tested, and documented in ChM and RDM.



The following workflow (Figure 8) depicts the Fulfillment sub-process.

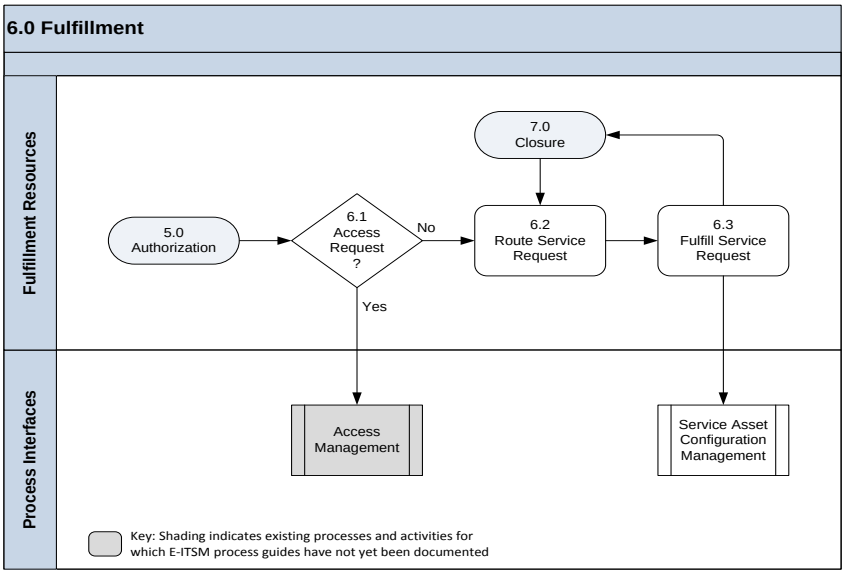


Figure 8: Fulfillment Sub-Process

Table 14 describes the Fulfillment sub-process steps as depicted in Figure 9.

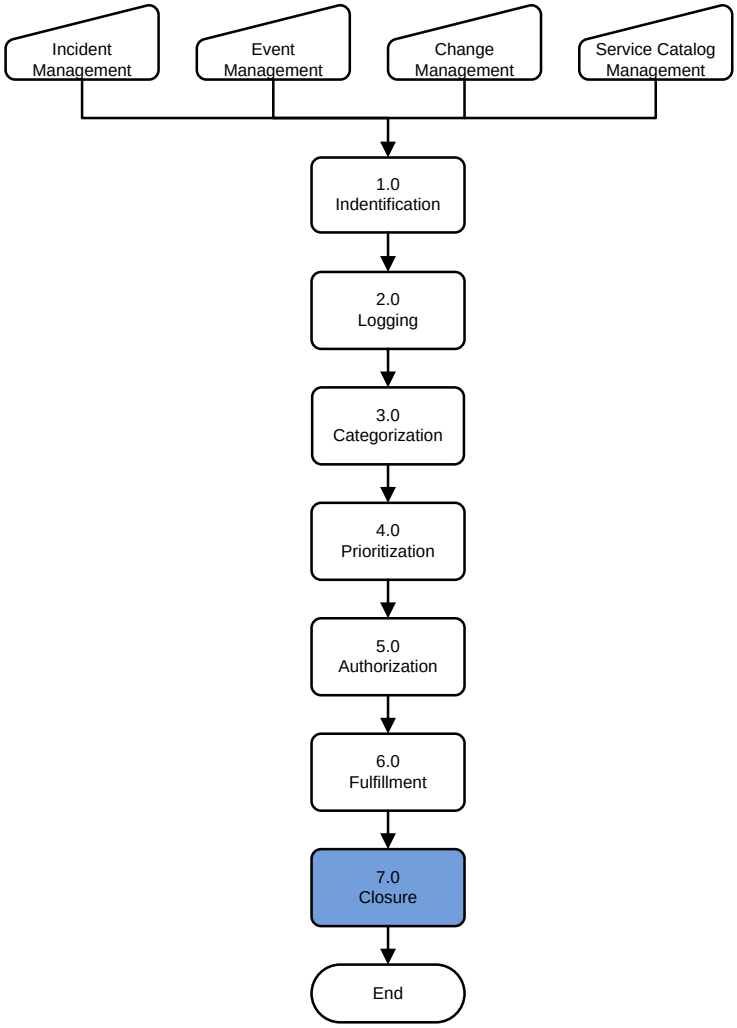
Table 14: Fulfillment Sub-Process Descriptions

6.0 Fulfillment		
Number	**Process Activity**	**Description**
6.1	Access Request?	Some request types require that Access Management perform Fulfillment activities. The type and categorization of the request are used to determine if the request will be routed to Access Management. 1. Yes: If the inclusion of Access Management is required, then route to the Access Management process. 2. No: If the inclusion of Access Management is not required, then proceed with routing for fulfillment.
6.2	Route Service Request	Service Requests are passed to the predefined fulfillment team for completion.
6.3	Fulfill Service Request	The Request Fulfillment resources complete the request as defined within the procedures related to the request type. If the fulfillment of the request involves adding, modifying, or decommissioning a Configuration Item (through a standard change), then information is provided to Asset Management and Configuration Management. Additionally, the Fulfillment resources: 1. Execute necessary procedures to confirm the Service Request has been resolved. 2. Ensure the applied solution, escalation, transfer and activity information is recorded. 3. Provide Service Request status to the Service

6.0 Fulfillment		
Number	**Process Activity**	**Description**
		Catalog interface for user retrieval. 4. Route the Request for Closure.

4.7 Closure

The Request Administrator verifies that the Service Request is fulfilled and that the Service Request can be closed. The Service Request is then closed.



The following workflow (Figure 9) depicts the Closure sub-process.

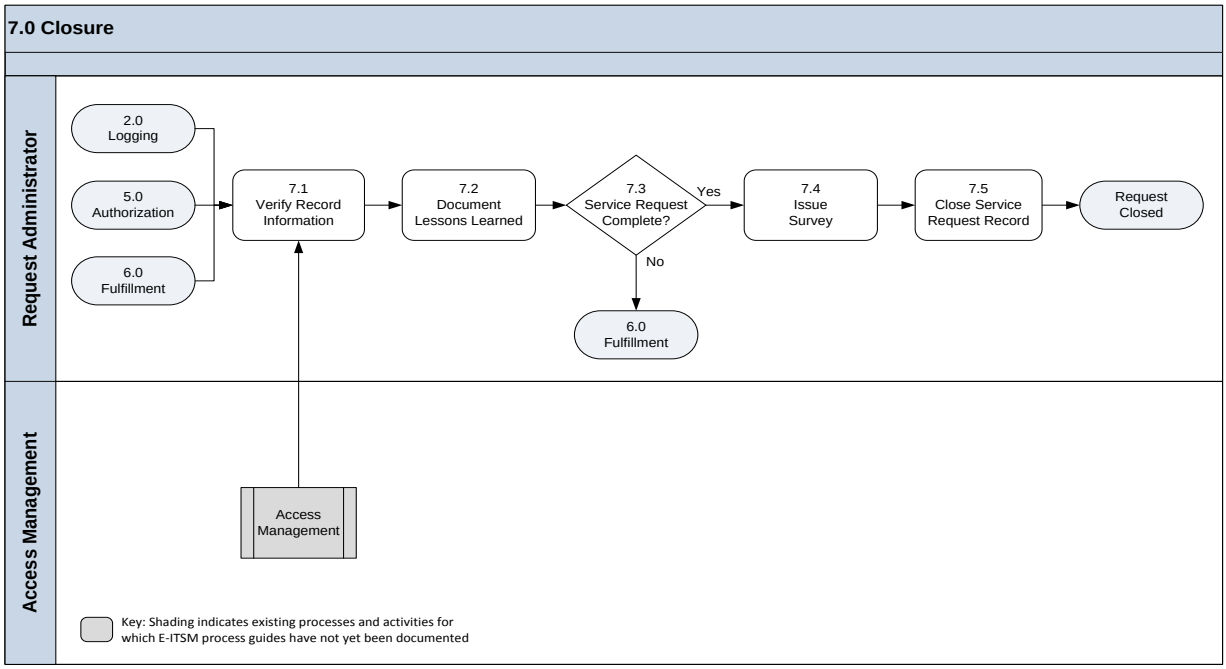


Figure 9: Closure Sub-process

Table 15 describes the Closure sub-process steps as depicted in Figure 10.

Table 15: Closure Sub-Process Descriptions

7.0 Closure		
Number	**Process Activity**	**Description**
7.1	Verify Record Information	The Request Administrator ensures the routing, authorization, and fulfillment procedure information is accurately referenced in the record. Outside AOR records flow in to the Closure sub-process from Logging. Requests denied by approval authorities flow to the Closure sub-process from Authorization. Fulfilled requests flow to the Closure sub-process from Fulfillment. Access requests flow to the Closure sub-process from Access Management.
7.2	Document Lessons Learned	The Request Administrator ensures the fulfillment description, escalation, transfer and activity information is complete on the record. Improvement opportunities identified during the fulfillment of the Service Request are also documented and forwarded to the appropriate Service Owner. Does not apply to an Outside AOR record.
7.3	Service Request Complete?	The Request Administrator verifies with the requestor that the

7.0 Closure		
Number	**Process Activity**	**Description**
		Service Request has been completed. Each attempt to reach the requestor is documented in the request record. 1. Yes: If the requestor verifies that the Service Request has been completed, then continue to issue survey. 2. No: If requestor indicates that the request has not been completed, then return to routing for fulfillment. If the requestor has not responded within the timeframe specified for that type of request/service, then proceed to Issue Survey. Does not apply to an Outside AOR record.
7.4	Issue Survey	Issue customer satisfaction survey. Does not apply to an Outside AOR record.
7.5	Close Service Request Record	Close the request record.

Appendix A – ACRONYMS

The official list of E-ITSM acronyms can be found on the Enterprise Information Technology Service Management site (https://eis.usmc.mil/sites/irm/ITSM/default.aspx). The link to the document is referenced below:

https://eis.usmc.mil/sites/irm/ITSM/Documents/Forms/AllItems.aspx?RootFolder=%2Fsites%2Firm%2FITSM%2FDocuments%2FE%2DITSM%20Acronym%20List&FolderCTID=0x0120001918760B7D35A5478C0474985E3ACBCD&View={9CD820B3-EF85-4D2C-BD0C-A255AEE9E40D}

Appendix B – GLOSSARY

Term	Definition
Asset Management	Asset Management is the process responsible for tracking and reporting the financial value and ownership of assets throughout their lifecycle.
Back-out Plan	A Back-out Plan is developed in the Release planning phase. This plan provides a recovery plan to return to the original configuration or process if the release fails to achieve the planned outcome.
Backup	Backup is copying data to protect against loss of integrity or availability of the original data.
Change Schedule	A Change Schedule is a document that lists all approved changes and their planned implementation dates.
Configuration Control	Configuration Control is a sub-process of Configuration Management. Configuration Control is a set of processes and approval stages required to change a CI attribute. Configuration Control encompasses the oversight to ensure that a CI is changed through the Change Management process.
Configuration Identification	A sub-process of Configuration Management, Configuration Identification is the selection, identification, and labeling of the configuration structures and CIs including their respective technical owner and the relationships between them. CIs become the manageable unit that is planned for release into a configuration controlled environment. The CIs consist of hardware, software, services, and documentation.
Configuration Item	A Configuration Item (CI) is any component that needs to be managed in order to deliver an IT Service. Information about each CI is recorded in a Configuration Record within the Configuration Management System (CMS) and is maintained throughout its lifecycle by Configuration Management. CIs are under the control of Change Management. CIs typically include IT services, hardware, software, buildings, people and formal documentation such as process documentation and SLAs.
CI Type	CI Type is a category used to Classify CIs. The CI Type identifies the required attributes and relationships for a configuration record. Common CI Types include: server, document, user, etc.
Configuration Management Database	A Configuration Management Database (CMDB) is a database used to store configuration records throughout their lifecycle. The Configuration Management System (CMS) maintains one or more CMDBs and each CMDB stores attributes of CIs and relationships with other CIs.
Configuration Management Plan	Document defining how configuration management will be implemented (including policies and procedures) for a particular acquisition or program. (Source: MIL HDBK-61A)
Configuration Management System	A Configuration Management System (CMS) is a set of tools and databases used to manage an IT service provider's configuration data. The CMS also includes information about incidents, problems, known errors, changes, and releases and may contain data about employees, suppliers, locations, units, customers and users. The CMS includes tools for collecting, storing, managing, updating and presenting data about all CIs and their relationships. The CMS is maintained by Configuration Management and is used by all IT Service Management processes.
Deployment	Deployment is the activity responsible for movement of new or changed hardware, software, documentation, process, etc. to the live environment. Deployment is part of the Release and Deployment Management Process.
Deployment Readiness Test	A Deployment Readiness Test is conducted to ensure that the deployment processes, procedures, and systems can deploy, install, commission, and decommission the release package and resultant new or changed service in the production/deployment environment.
Deployment Verification Test	A Deployment Verification Test is conducted to ensure the service capability has been correctly deployed for each target deployment group or environment.

Term	Definition
Early Life Support	Early Life Support (ELS) involves Technical Management or IT Operations providing support for a new or changed IT service for a period of time after it is released. During ELS, the IT service provider may review the KPIs, service levels, and monitoring thresholds and provide additional resources for incident management and problem management (when implemented).
EM System	The EM System (EMS) is comprised of tools which monitor CIs and provide event notifications. It is a combination of software and hardware which provides a means of delivering a message to a set of recipients. The EMS often requires real-time interaction, escalation, and scheduling.
Environment	Environment is a subset of the IT infrastructure used for a particular purpose (e.g., live environment, test environment or build environment). It is possible for multiple environments to share a CI (e.g., test and live environments may use different partitions on a single mainframe computer). In the term physical environment, environment can be defined as the accommodation, air conditioning, power system, etc. Environment can be used as a generic term defined as the external conditions that influence or affect something.
Error	An Error is a design flaw or malfunction that causes a failure of one or more CI or IT services. A mistake made by a person or a faulty process that affects a CI or IT service is also an error.
Escalation	Escalation is an activity that obtains additional resources when needed to meet service-level targets or customer expectations.
Event	An Event is a piece of data that provides information about one or more system resources. Most events are benign. Some events show a change of state which has significance for the management of a CI or IT service. The term 'event' is also used to define an alert or notification created by any IT service, CI, or monitoring tool. Events typically require IT operations personnel to take actions and often lead to incidents being logged.
Event Correlation	Event correlation involves associating multiple related events. Often, multiple events are generated as a result of the same infrastructure fault. Events need correlation to prevent duplication of effort in resolving the original fault.
Exit and Entry Criteria (Pass/Fail)	These are criteria (defined well in advance and accepted by the stakeholders) defined at authorized points in the Release and Deployment Process to set expectations of acceptable/unacceptable results.
Fault	Fault is the deviation from *normal* operation of a CI or a series of CIs. A fault is a design flaw or malfunction that causes a failure of one or more CIs or IT services. Fault is also referred to as an error.
Governance	Governance is the process of ensuring policies and strategy are actually implemented and that required processes are correctly followed. Governance includes defining roles and responsibilities, measuring, and reporting and taking actions to resolve any issues identified.
Key Performance Indicator	A Key Performance Indicator (KPI) is a metric used to help manage a process, IT service, or activity. Many metrics may be measured, but only the most important of these are defined as KPIs and used to actively manage and report on the process, IT service, or activity. KPIs are selected to ensure that efficiency, effectiveness, and cost effectiveness are all managed.
Known Error	A Known Error is a problem that has a documented root cause and a work-around. Known errors are created and managed throughout their lifecycle by Problem Management. Known errors may also be identified by SIE or suppliers.
Monitoring	Monitoring is the process of repeated observation of a CI, IT service, or process to detect events and to ensure that the current status is known.
Notification	Notification is a communication that provides information.
Pilot	A Pilot is a limited deployment of an IT service, a release, or a process to the live environment. A pilot is used to reduce risk and to gain user feedback and acceptance.

Term	Definition
Process	A Process is a structured set of activities designed to accomplish a specific objective. A process takes one or more defined inputs and turns them into defined outputs. A process may include any of the roles, responsibilities, tools, and management controls required to reliably deliver the outputs. A process may define policies, standards, guidelines, activities, and work instructions, if needed.
Quality Assurance	Quality Assurance (QA) is the process responsible for ensuring the quality of a product and also ensuring it will provide its intended value.
Role	A Role refers to a set of connected behaviors or actions that are performed by a person, team, or group in a specific context.
Severity	Severity refers to the level or degree of intensity.
Service Design Package	A Service Design Package (SDP) is composed of document(s) defining all aspects of an IT service and its requirements through each stage of its lifecycle. An SDP is produced for each new IT service, major change, or IT service retirement.
Service Improvement Plan	A Service Improvement Plan (SIP) is a formal plan to implement improvements to a process or IT service.
Service Knowledge Management System	A Service Knowledge Management System (SKMS) is a set of tools and databases used to manage knowledge and information. The SKMS includes the Configuration Management System (CMS) as well as other tools and databases. The SKMS stores, manages, updates, and presents all information that an IT service provider needs to manage the full lifecycle of IT services.
Service Level Agreement	A Service-Level Agreement (SLA) is an agreement between an IT service provider and a customer. The SLA describes the IT service, documents service-level targets, and specifies the responsibilities of the IT service provider and the customer. A single SLA may cover multiple IT services or multiple customers.
Service Validation and Testing	Service Validation and Testing is the process responsible for validation and testing of a new or changed IT service. Service Validation and Testing ensures an IT service matches the design specification and will meet the needs of the business. Service Validation and Testing during release conducts testing in the pre-production Systems Integration Environment (SIE) and during deployment in the pilot production environment.
Single Point of Contact	A Single Point of Contact (SPOC) is an agreement used to assign a single, consistent way to communicate within an organization or unit. For example, the Service Desk will be the SPOC for a service provider.
Snapshot	A Snapshot is the baseline as captured by a discovery tool. A snapshot can also be called a benchmark.
Test	A Test is an activity that verifies that a CI, IT service, or process meets its specification or agreed requirements.
Test Environment	A Test Environment is a controlled environment used to test CIs, builds, IT services, and processes.
Throttling	Some events do not need to be acted on until they have occurred a number of times within a given time period. This is called Throttling. Once a repeated event has reached its limit for repetition, forward that event to be acted upon.
User Acceptance Testing	User Acceptance Testing is a testing activity conducted by the user intended to verify a CI, IT service, or process meets a specification. It is also used to validate whether agreed requirements have been met.
Work-around	Work-arounds for problems are documented in known error records and are intended to reduce or eliminate the impact of an incident or problem for which a full resolution is not yet available. Work-arounds for incidents that do not have associated problem records are documented in the incident record.
Work Instruction	The Work Instruction is a document containing detailed instructions that specify exactly what steps are followed to carry out an activity. A work instruction contains much more detail than a procedure and is only created if very detailed instructions are needed.

Term	Definition
Configuration Item	A Configuration Item (CI) is any component that must be managed to deliver an IT Service. Information about each CI is recorded in a Configuration Record within the Configuration Management System (CMS) and is maintained throughout its lifecycle by Configuration Management. CIs are under the control of Change Management. CIs typically include IT services, hardware, software, buildings, people and formal documentation such as process documentation and SLAs.
Critical Success Factor	A Critical Success Factor (CSF) is something that must happen or exist for a process to succeed in its operation. The achievement of a CSF's is measured by one or more Key Performance Indicators (KPI) and every KPI should align with a CSF.
Deployment	Deployment is the activity responsible for movement of new or changed hardware, software, documentation, process, etc. to the live environment. Deployment is part of the Release and Deployment Management Process.
Escalation	Escalation is an activity that obtains additional resources when needed to meet service-level targets or customer expectations.
Governance	Governance is the process of ensuring policies and strategy are actually implemented and that required processes are correctly followed. Governance includes defining roles and responsibilities, measuring, and reporting and taking actions to resolve any issues identified.
Key Performance Indicator	A Key Performance Indicator (KPI) is a metric used to help manage a process, IT service, or activity. Many metrics may be measured, but only the most important of these are defined as KPIs and used to actively manage and report on the process, IT service, or activity. KPIs are selected to ensure that efficiency, effectiveness, and cost effectiveness are all managed.
Known Error	A Known Error is a problem that has a documented root cause and a work-around. Known errors are created and managed throughout their lifecycle by Problem Management. Known errors may also be identified by SIE or suppliers.
Monitoring	Monitoring is the process of repeated observation of a CI, IT service, or process to detect events and to ensure that the current status is known.
Notification	Notification is a communication that provides information.
Process	A Process is a structured set of activities designed to accomplish a specific objective. A process takes one or more defined inputs and turns them into defined outputs. A process may include any of the roles, responsibilities, tools, and management controls required to reliably deliver the outputs. A process may define policies, standards, guidelines, activities, and work instructions, if needed.
Quality Assurance	Quality Assurance (QA) is the process responsible for ensuring the quality of a product and also ensuring it will provide its intended value.
Request Fulfillment	Request Fulfillment (RqF) is the process responsible for the management of all requests through their lifecycle. It is also the action of providing for user requests as governed by the RqF process.
Role	A Role refers to a set of connected behaviors or actions that are performed by a person, team, or group in a specific context.
Service Knowledge Management System	A Service Knowledge Management System (SKMS) is a set of tools and databases used to manage knowledge and information. The SKMS includes the Configuration Management System (CMS) as well as other tools and databases. The SKMS stores, manages, updates, and presents all information that an IT service provider needs to manage the full lifecycle of IT services.
Service Level Agreement	A Service-Level Agreement (SLA) is an agreement between an IT service provider and a customer. The SLA describes the IT service, documents service-level targets, and specifies the responsibilities of the IT service provider and the customer. A single SLA may cover multiple IT services or multiple customers.
Service Request	A Service Request is a request from a user for information, or advice, or for access to an IT service. Many service requests are actually standard changes, which are low-risk, CAB approved and pre-designed/documented change.

Term	Definition
Single Point of Contact	A Single Point of Contact (SPOC) is an agreement used to assign a single, consistent way to communicate within an organization or unit. For example, the Service Desk is the SPOC for a service provider.
Standard Change	A pre-approved change that is low risk, relatively common, and follows a procedure or work instruction.
Work Instruction	The Work Instruction is a document containing detailed instructions that specify exactly what steps are followed to carry out an activity. A work instruction contains much more detail than a procedure and is only created if very detailed instructions are needed.