

Collaboration Program Process -V6

Process Narrative

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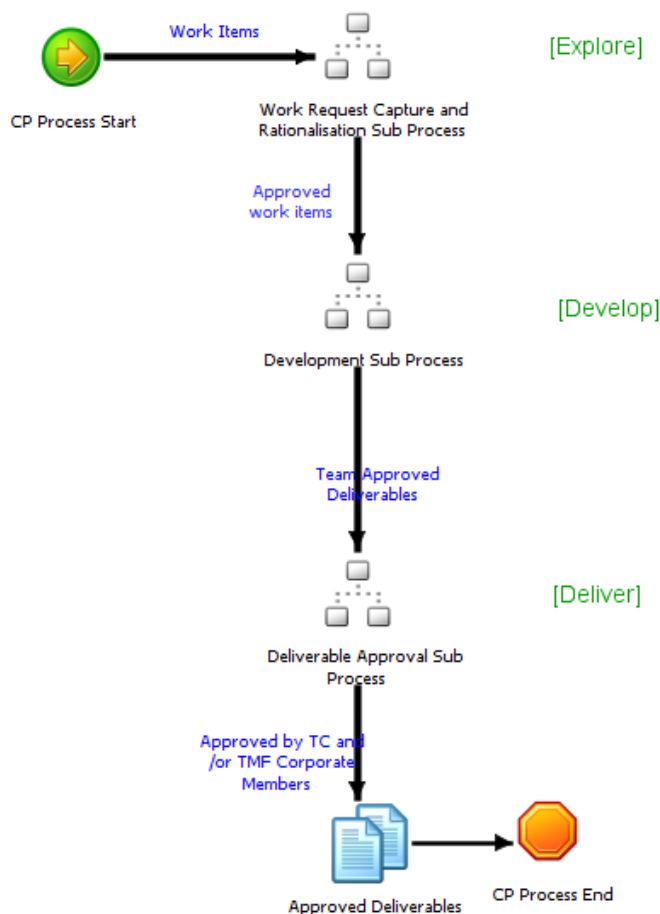
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1.0 Collaboration Program Process

Process Narrative

Collaboration Program Process

Description Looking to start from scratch.



This process document outlines the main processes related to the Collaboration Program. Through the use of sub-process it will branch into the various aspects.

In each case the 'Owner' for the sub-process and/or activity will be identified. Required inputs and outputs of the sub-process/activity will be document under the section titled 'Requirements' (limitation placed by the tool). Finally, the 'Performed By' section will identify the key stakeholders.

In addition to this document, it is strongly recommended that the guideline documents and help text for the various tools provided be consulted. These are available from the community area.

1.1 CP Process Start

This process describes the Collaboration Program end to end process from the capture of work requests through to delivery of TM Forum material. It includes such items as project initiation, Deliverable development, review & approval stages etc.

1.2 Work Request Capture and Rationalisation Sub Process

New work and change requests may be captured from a number of different sources using a common on-line entry point, (http://www.tmforum.org/Community/groups/collaboration_program_center/changerequest.aspx). These work requests are brought together into a single, consolidated list, indicating a priority level. These are then filtered and assigned to an appropriate working group.

By default items entered here will be of a Maturity level 0 (not set) or 1.

Refer to detailed 'Work Request capture and rationalisation' sub process for complete details.

Owner

Name	Description	Type
 Change Control Group		Group



1.3 Development Sub Process

During this phase of the project, the project team must operate within the scope of the approved project charter and according to the TM Forum by-laws and IPR rules as defined in the Operating Guide.

This section focuses on agreeing to the exact format of the deliverables, creating the deliverables and ensuring initial quality assurance is completed.

Refer to the detailed 'Development Phase' sub process for complete details

Owner



Name	Description	Type
 SVP Collaboration Program	Person heading up the Collaboration Program of the TM Forum.	Role
 Team Leaders Group		Group

1.4 Deliverable Approval Sub Process

Once Collaboration Project artefacts are submitted for approval, this process flow outlines the steps which it must undergo in order to achieve approval and it identifies the roles & groups who are required to part take in those steps.

Refer to the 'Deliverable Approval Sub Process' for details.

Owner

Name	Description	Type
 Program Management	Person who manages and maintains the Collaboration Program roadmap.	Role
 Technical Committee	Sub-committee of the board that provides the detailed technical strategy and guidance for technical projects	Group

1.5 Approved Deliverables

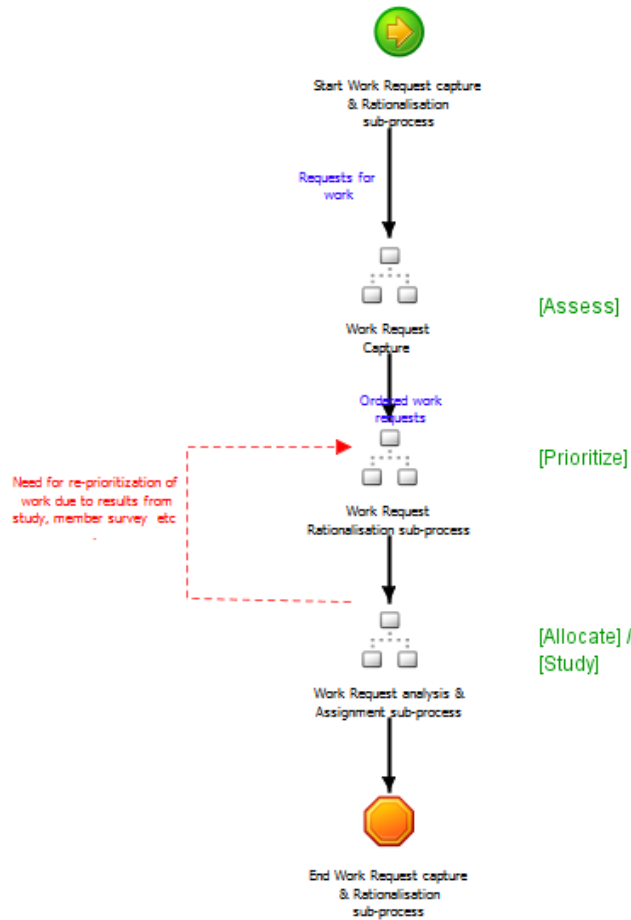
Documents, model files etc. required to meet the project deliverables

1.6 CP Process End

2.0 Work Request Capture and Rationalisation Sub Process

Process Narrative

Work Request Capture and Rationalisation Sub Process



New work and change requests may be captured from a number of different sources using a common on-line entry point, (http://www.tmforum.org/Community/groups/collaboration_program_center/changerequest.aspx). These work requests are brought together into a single, consolidated list, indicating a priority level. These are then filtered and assigned to an appropriate working group.

By default items entered here will be of a Maturity level 0 (not set) or 1.

Refer to detailed 'Work Request capture and rationalisation' sub process for complete details.

Owner

Name	Description	Type
 Change Control Group		Group

2.1 Start Work Request capture & Rationalisation sub-process

Work requests are captured, consolidated into a single stream and sanity checked.

2.2 Work Request Capture

Work requests entered via the online form are automatically stored in a central repository. From here it is sanity checked by TM Forum staff and the appropriate Maturity level, (default 1) is set. It is then assigned and forwarded to a CR Manager who will manage it through the remainder of its life.

A quick pre-assessment is conducted by the CR Manager to ensure straightforward items can be addressed quickly and more complex ones are sent for more detailed analysis. Approx 10% of the requests will complete its assessment at this phase of the process.

The duration of this phase should be a 1 to 2 days.

Maturity level for items in this phase would typically be of a level 1 (IPR and other sanity

checks having been completed).

Refer to the Work Request sub-process for more details.

Owner

Name	Description	Type
 CCG Admin		Role

2.3 Work Request Rationalisation sub-process

Within this sub-process the more complex work requests are put forward for initial assessment by the complete CCG and from here it will get routed down the most appropriate path. This could be to be deferred, rejected or continue on for further analysis/investigation, and assigned to the appropriate investigating body. At this point the bulk of work requests will go for further assessment.

This phase should be completed by 2 weeks of request submission.

Maturity level of work requests at this phase would typically be of a level 1, Request such as Fast track items, which would have completed their assessment phase would be upgraded to maturity level 2.

Refer to the Work Request Rationalisation Sub-process for complete details.

Owner

Name	Description	Type
 CR Manager		Role

2.4 Work Request analysis & Assignment sub-process


Within this phase, The stakeholders, (who could be a single person or a team of people depending on complexity of the request), review the work requests and provide an assessment, (which can be a single line in the requestor tracker or a detailed report - once again, depending on complexity of request), on their findings & recommendations. These return to the CCG where they are rejected or allocated to existing projects or a proposal to start the procedure to initiate a new project.

Duration of this phase can take from 1 day to 3 months depending on complexity.

Once work request have completed their assessment, they will have progressed to a Maturity level 2.

Refer to the detailed 'Requirements Analysis and Assignment' Sub Process for complete details.

Owner

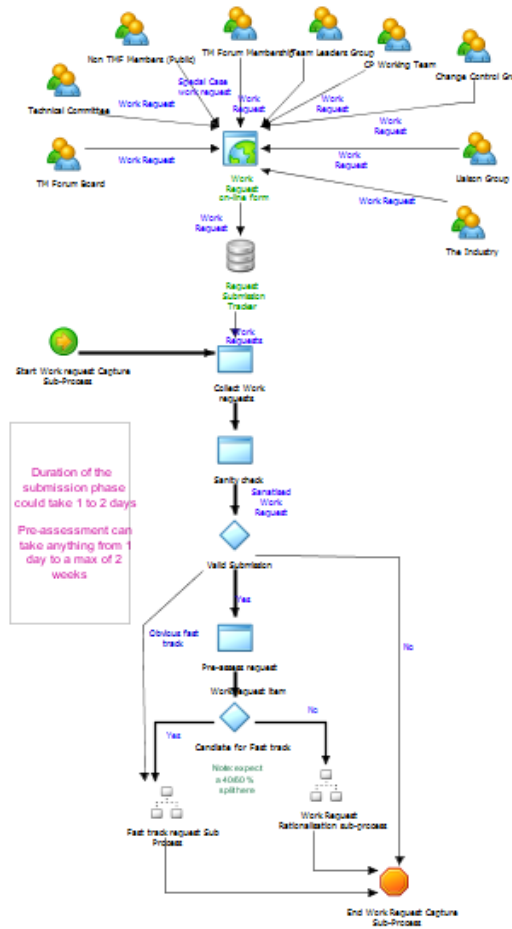
Name	Description	Type
 Change Control Group		Group

2.5 End Work Request capture & Rationalisation sub-process

3.0 Work Request Capture

Process Narrative

Work Request Capture



Work requests entered via the online form are automatically stored in a central repository. From here it is sanity checked by TM Forum staff and the appropriate Maturity level, (default 1) is set. It is then assigned and forwarded to a CR Manager who will manage it through the remainder of its life.

A quick pre-assessment is conducted by the CR Manager to ensure straightforward items can be addressed quickly and more complex ones are sent for more detailed analysis. Approx 10% of the requests will complete its assessment at this phase of the process.

The duration of this phase should be a 1 to 2 days.

Maturity level for items in this phase would typically be of a level 1 (IPR and other sanity checks having been completed).

Refer to the Work Request sub-process for more details.

Owner

Name	Description	Type
CCG Admin		Role

3.1 Start Work request Capture Sub-Process

3.2 Work Request on-line form

Hyperlink

URL / File Path

http://www.tmforum.org/Community/groups/collaboration_program_cen ...

When & Who:

This level of work request entry is usually used to capture:

1. General work requests which cross a number of programs
2. Work items for teams that are not being addressed within the current team scope.
3. Team submissions for change reflecting next body of work and collation of internal submissions etc.
4. Strategic planning
5. Or if in doubt as to where to submit the request.

Note: Active team members who wish to submit requests of change/submissions that are within the scope of a body of work which is currently being addressed by their working team, should submit them directly into the team in question.

How:

To enter change requests or requests for work within the Collaboration program, select the Change Requests tab of the community and then Submit New Change Request. In the change request form you can either list the changes as text directly into the form, or upload a documented list or a revised word version of the particular TM Forum document (change tracking on) as an attachment.


Owner

Name	Description	Type
 Change Control Group		Group

3.3 Request Submission Tracker

Central database where all the changes are recorded, stored and tracked.

Owner

Name	Description	Type
 Program Management	Person who manages and maintains the Collaboration Program roadmap.	Role

3.4 Collect Work requests

Work requests, (which can take the form of: requirements, change Requests, deliverable review comments, solution proposals, catalyst results & examples, analyst reports, etc.) are captured from various sources, (which include but not restricted to Technical Committee, Sector Heads, Interest Groups, communities, TMF Membership and the CCG). It should be noted that Sector inputs will be treated in the same manner as other Collaboration Program Working Teams.

From here they will be entered and tracked within the Request tracking system, which can track Change requests or new requirements. This allows easy transfer of information throughout the process as needs be.

To submit a Work request, details are entered into the relevant on-line Request Submission Form which is available from the community area. The main entry forms include: Change Request and Deliverable Review comments.

Other mechanisms for the submission of work requests can be via the TM Forum Strategic plan. These requests need to be extracted from the plan and entered into the on-line tracking system. (It should be noted that the Strategic plan also provides prioritization information).

Note: An active participant of a team should submit requests against work currently being addressed within their team, directly to that team.

Owner

Name	Description	Type
 CCG Admin		Role

3.5 Sanity check

Once received, the administrator will do a quick sanity check to ensure it is completed correctly, organise the submissions into the correct categories, (e.g. discipline, domain, feature, solution etc.), and assign to the appropriate member of the CCG to act as CR Manager.

Work requests may include:

1. A formal submission of a problem; for example an error in the documentation, requesting that it be corrected, (e.g. a Deliverable Review Comment)

2. A request to make changes submitted as a marked solution; for example a new Artifact or revision to an existing Artifact to be included in the next release of an existing Baseline, (can be a Change Requests)
3. A request to address an identified problem in an existing baseline with no marked solution, (e.g. known as Change request)
4. A request for work in an area which is currently not being addressed, this may or may not have a marked solution and generally known as a new requirement.

During the sanity check the following items need to be considered:

- ** Is there enough information available within the request to be able to address it
- ** Is the request related to material baselined within the remit of the CCG or should it go to the Team Leaders Group for more detailed analysis
- ** Does the request fall under one of the allowable types of request
- ** Is the request submitted by a TM Forum member or public.
- ** Are there obvious IPR implications

In instances where it is an obvious 'fast track' item, like deliverable review comments against a particular document of a cosmetic nature, the CCG admin can forward directly to the team (assigning it to an appropriate CR Manager, who will automatically get notified) and set the status to 'Fast Track'.

Duration of this phase would typically be a day. Maturity level will default to 0 (not set) and upgraded to a level 1 after initial sanity check. Note, any items set to fast track will be of a maturity level 2 as assessment has been complete.

Owner

Name	Description	Type
 CCG Admin		Role




3.6 Valid Submission

If submission is not valid, it is closed from the system and a response sent to the requestor where appropriate.

Incoming Links

Name	Description	Link Label
 Sanity check		Sanatised Work Request

Outgoing Links

Name	Description	Decision
 End Work Request Capture Sub-Process		No
 Fast track request Sub Process		Obvious fast track
 Pre-assess request		Yes

3.7 Pre-assess request

The assigned request is then pre-assessed by the CR Manager. Focusing on:

- a. Technical Completeness
- b. Duplication to other requests or part requests
- c. Conflicts to other requests
- d. Conformance with product scope, standards, TM Forum strategy etc.
- e. Whether the proposer has offered resources (Which can result in requests being put on hold)

Where possible, complex requests are broken down into components which relate to the technical program operations structure. Separate child change requests need to be created to accommodate this, linking back to the parent (original) request. After initial breakdown and as appropriate, these will route to the CCG for discussion. To enable this, the CR Manger sets the status of the request to 'discussion required'.

At the discussion of the CR Manager, clearly defined requests can be fast tracked through the system at this point, with its status being set to 'Fast track' .

Candidates for fast track will usually be:

- a) An urgent fix for some major problem in the field" even where this may cause a change in

other priorities

- b) A clearly defined, simple body of work for a single team or existing orchestrated set of teams
- c) Obvious that it is linked to an existing body of work which is being implemented and is in scope of that work
- d) Natural extension to a current body of work, that appears to have no significant change to work load.
- e) Bug fix to current release, (which may fast track the assessment process, but trickle through the development process)
- f) Review comments of a cosmetic or straight forward nature.

Note: Work requests can only be fast tracked to a single team or an existing orchestrated set of teams which are currently working on 'the' or a closely related activity.

Pre-assessment can take anything from 1 day to a max of 2 weeks, with the Maturity Level ranging from 1 for those currently being assessed and a level 2 for the fast track items as assessment has been complete.

Owner

Name	Description	Type
 CR Manager		Role


3.8 Candidate for Fast track

Rule of Thumb - if in doubt DO NOT FAST TRACK a work request.



Work requests can only be fast tracked to a single team or an existing orchestrated set of teams which are currently working on 'the' or highly related activity.

Note: No CCG vote required for fast track, but tagging allows the CCG to be aware and review those items.

Incoming Links

Name	Description	Link Label
 Pre-assess request		Work request item

Outgoing Links

Name	Description	Decision
 Work Request Rationalisation sub-process		No
 Fast track request Sub Process		Yes

3.9 Fast track request Sub Process

The fast track mechanism allows for the quick turn around for work requests which are straight forward in nature and/or are of an urgent nature.

Refer to the Fast Track Request sub-process for details.

Owner

Name	Description	Type
 CR Manager		Role

3.10 Work Request Rationalisation sub-process

Within this sub-process the more complex work requests are put forward for initial assessment by the complete CCG and from here it will get routed down the most appropriate path. This could be to be deferred, rejected or continue on for further analysis/investigation, and assigned to the appropriate investigating body. At this point the bulk of work requests will go for further assessment.

This phase should be completed by 2 weeks of request submission. Maturity level of work requests at this phase would typically be of a level 1, Request such as Fast track items, which would have completed their assessment phase would be upgraded to maturity level 2.

Refer to the Work Request Rationalisation Sub-process for complete details.

Owner

Name	Description	Type
 CR Manager		Role

3.11 TM Forum Board

The TM Forum board elected by the membership

3.12 Technical Committee

The chief duties of this committee are to develop the strategic plan in collaboration with the members. It also provides advice and guidance to the board, participates in the review and approval of project charters and deliverables as well as input to the Strategic Operating Plan

3.13 Non TMF Members (Public)

Denotes requests from other organisation or suggestions from outside the TM Forum Membership

3.14 Change Control Group

The Change Control Group (CCG) will provide a single body for the review, analysis and approval of changes to an existing product baseline. Initially the baseline will focus on documentation sets. This will be expanded to include models and other product types in due course.

The Change Control Group will report to the Technical Committee and is tasked with responsibility for ensuring that the change control process as documented in TECH-07, Change Control Process, is adhered to by the TMF Technical Program.

3.15 TM Forum Membership

Members of the TM Forum

3.16 CP Working Team

Current list of Collaboration Program Working teams available from the communities at: <http://www.tmforum.org/Community/groups/>

3.17 Liaison Group

Deals with interactions between TM Forum and other standards organizations where there are areas of common interest.

3.18 The Industry

Groups of individuals and companies representing the communications Industry

3.19 Team Leaders Group

The Team Leaders of all the standing technical teams are invited to join the Team Leaders Group, (TLG). The objectives of this group are:

- To maintain an oversight of the overall progress of the technical program
- To help review project charters and technical documents prior to submission to the Technical Committee for vote
- To identify complimentary areas between programs which may help to accelerate work
- To identify possible areas where programs are creating duplication or divergent approaches from strategic TMF directions
- To help in allocation of resources between projects where appropriate
- To help resolve conflict between teams and make recommendations to the Technical Committee

This team represents a broad constituency and have a good spread of technical knowledge. This team will get sight of project charters and technical documents so that comments and recommendations can be made to the Technical Committee to help them in voting.

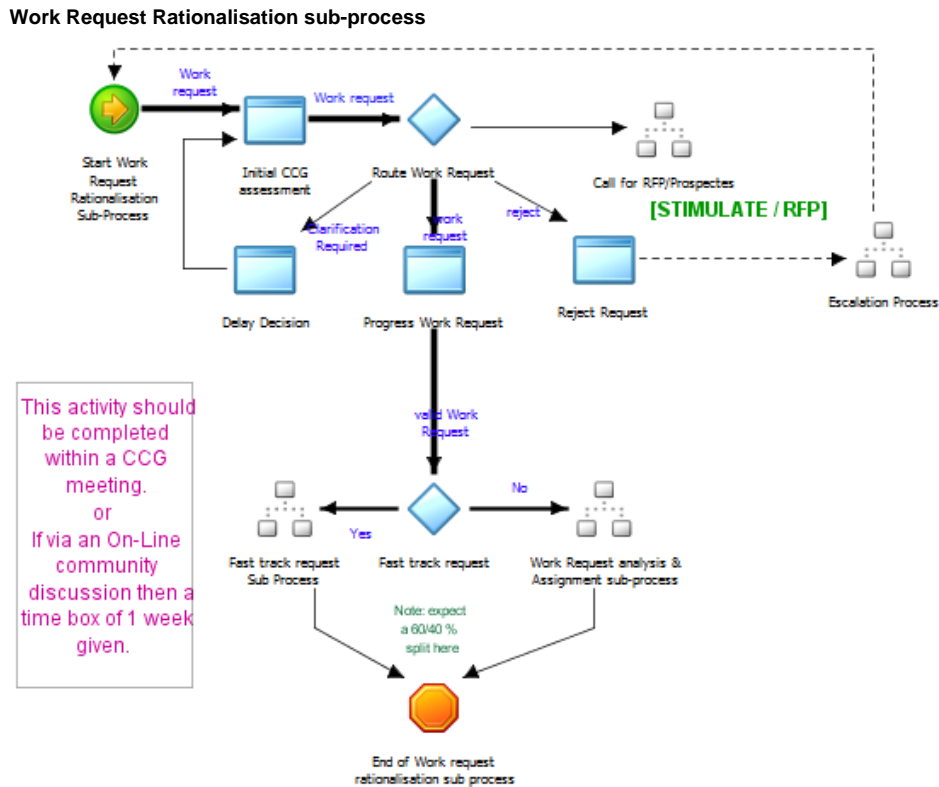
The TLG aims to

- meet by conference call twice a month and at TAW to share progress in work and to discuss any points of conflict or overlap
have a significant impact on the direction of the TMF Technical Program

3.20 End Work Request Capture Sub-Process

4.0 Work Request Rationalisation sub-process

Process Narrative



Within this sub-process the more complex work requests are put forward for initial assessment by the complete CCG and from here it will get routed down the most appropriate path. This could be to be deferred, rejected or continue on for further analysis/investigation, and assigned to the appropriate investigating body. At this point the bulk of work requests will go for further assessment.

This phase should be completed by 2 weeks of request submission. Maturity level of work requests at this phase would typically be of a level 1, Request such as Fast track items, which would have completed their assessment phase would be upgraded to maturity level 2.

Refer to the Work Request Rationalisation Sub-process for complete details.

Owner

Name	Description	Type
CR Manager		Role

4.1 Start Work Request Rationalisation Sub-Process

4.2 Initial CCG assessment

The pre-assessment of the work request, including any breakdown, (child CR), that may have been created can be presented to the CCG, The CCG will quickly review the items to see if there are any underlying cross program, IPR or other implications.

It will then be agreed which route it, or the child requests should take.

If after discussion it is agreed that the request requires no further analysis it can be fast tracked to the assignment & implementation phase.

The work request entry is updated by either the CCG admin or CR Manager to record any key items of discussion & decisions made.

Duration of this will be 1 day, (discussed during meeting), Maturity level at this point will typically be a level 1.

Owner


Name	Description	Type
 Change Control Group		Group

4.3 Route Work Request





The individual work request can fork at this point

1. If further clarification is required, or perhaps a related activity needs to be completed before progressing with this item, the decision can be deferred. Note: Request should only go into the deferred decision loop once.
2. If obvious conflicts or IPR issues etc. arise, then the work request can be rejected.
3. It is a valid request and should progress down the normal path.

Incoming Links

Name	Description	Link Label
 Initial CCG assessment		Work request

Outgoing Links

Name	Description	Decision
 Call for RFP/Prospectes		
 Progress Work Request		work request
 Reject Request		reject
 Delay Decision		Clarification Required

4.4 Call for RFP/Prospectes

4.5 Delay Decision

In this case, the CCG has some reason to delay a decision and this could be that they require further information from either the requestor or the assessors or an other party. Types of reasons and associated timeframes are outlined below.

1. More information from Requestor. (1 day to a max of 1 month depending on complexity of data - if a response is not received within the allocated timeframe the CR can be rejected.)
2. More assessment by CR Manager and Expert reviewers (an additional week can be allotted in exception cases)
3. Request is premature at this moment in time (Depending on the level of prematurity, (and based upon strategic plan), the CCG will assign a wait-loop for it. This can be a month, 6 months, a year etc.).

The assigned CR Manager is responsible to ensure the information is received and keeps the CCG and the Requestor updated on progress.

All transactions and information relating to the CR are to be recorded in the system artifact by the CR Manager.

Maturity level will typically be a level 2 as assessment will have been complete.

Owner

Name	Description	Type
 Change Control Group		Group

4.6 Progress Work Request

The CCG will decide if this work request is obvious enough that it can be assigned to a team for implementation without further assessment. If yes then it can be fast tracked. I.e. if the request requires no further analysis

otherwise, the CCG and CR Manager must determine which teams and experts are required to complete an assessment of the request. Note: the experts could include other groups like the

Team Leaders Group, Technical committee or SPLC.

Maturity level will typically be a level 1 as assessment would not be complete.

Owner

Name	Description	Type
 Change Control Group		Group

4.7 Reject Request

The CR can be rejected for many reasons. Examples of which include: IPR issues, Goes against the TM Forum Strategy, unacceptably worded, etc.

The CR Manager will inform the Requestor of the CCG decision, stating the reasons. the status of the CR will be updated in the tracking tool to have a status of 'Closed -rejected'.

Note: In the event that a requestor of a CR is not satisfied with the decisions made by the CCG, an escalation process is available to them.

Maturity level will typically be a level 2 as assessment will have been complete.

Owner

Name	Description	Type
 Change Control Group		Group

4.8 Escalation Process

In the event that a requestor of a CR is not satisfied with the decisions made by the CCG, an escalation process is available to them, .by submitting their request and reasons for their dissatisfaction to the Technical Committee, no later than 1 month after notification of the decision. The Technical Committee will review the request in light of all the facts and make its decision, which could be one of the following:

1. Agree with CCG
2. Reassess with new information which had not previously been available
3. Technical Committee provide an alternative interpretation of the material already provided so as to assist the CCG in the assessment of the request.

(Note: It is possible that the further information may be required from the requestor, so the submission could iterate around this phase).



4.9 Fast track request

Did the CCG agree the request was a fast track item?

Incoming Links

Name	Description	Link Label
 Progress Work Request		valid Work Request

Outgoing Links

Name	Description	Decision
 Fast track request Sub Process		Yes
 Work Request analysis & Assignment sub-process		No

4.10 Fast track request Sub Process

The fast track mechanism allows for the quick turn around for work requests which are straight forward in nature and/or are of an urgent nature.

Refer to the Fast Track Request sub-process for details.

Owner

Name	Description	Type
 CR Manager		Role

4.11 Work Request analysis & Assignment sub-process

Within this phase, The stakeholders, (who could be a single person or a team of people depending on complexity of the request), review the work requests and provide an assessment, (which can be a single line in the requestor tracker or a detailed report - once again, depending on complexity of request), on their findings & recommendations. These return to the CCG where they are rejected or allocated to existing projects or a proposal to start the procedure to initiate a new project.

Duration of this phase can take from 1 day to 3 months depending on complexity. Once work request have completed their assessment, they will have progressed to a Maturity level 2.

Refer to the detailed 'Requirements Analysis and Assignment' Sub Process for complete details.

Owner

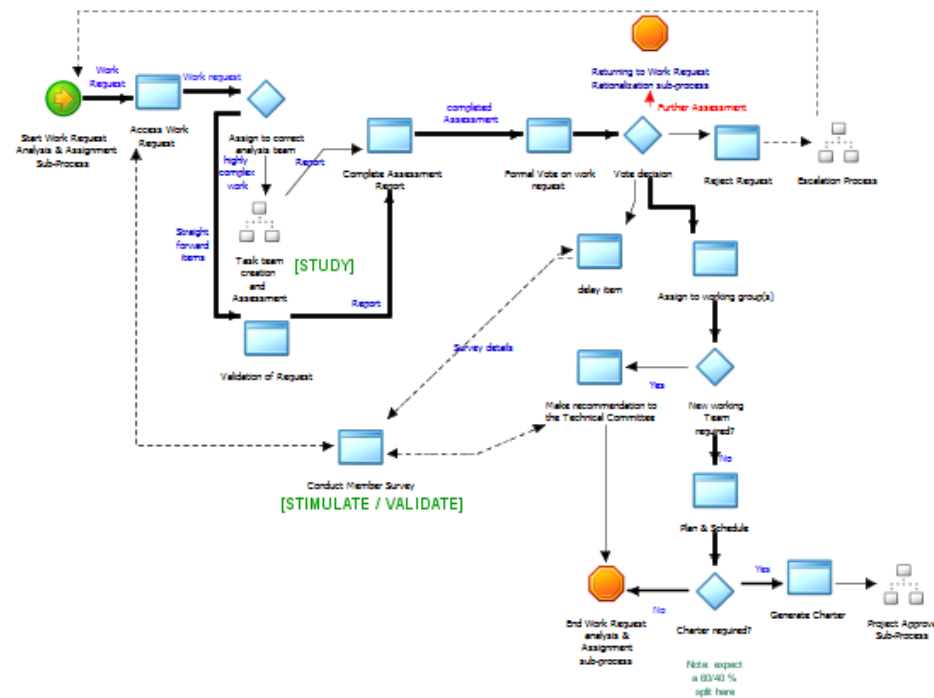
Name	Description	Type
 Change Control Group		Group

4.12 End of Work request rationalisation sub process

5.0 Work Request analysis & Assignment sub-process

Process Narrative

Work Request analysis & Assignment sub-process



Within this phase, The stakeholders, (who could be a single person or a team of people depending on complexity of the request), review the work requests and provide an assessment, (which can be a single line in the requestor tracker or a detailed report - once again, depending on complexity of request), on their findings & recommendations. These return to the CCG where they are rejected or allocated to existing projects or a proposal to start the procedure to initiate a new project.

Duration of this phase can take from 1 day to 3 months depending on complexity. Once work request have completed their assessment, they will have progressed to a Maturity level 2.

Refer to the detailed 'Requirements Analysis and Assignment' Sub Process for complete details.

Owner

Name	Description	Type
 Change Control Group		Group

5.1 Start Work Request Analysis & Assignment Sub-Process

5.2 Access Work Request

The CR Manager and assessment body, (i.e. made up of area experts and appropriate teams), reviews the work request(s) and assesses them in detail during the allotted timescale. The CR Manager must notify the appropriate teams of any CRs which affect their area. Where the CR will involve a significant change, the project team, (domain team etc.), must be included in the assessment of the CR and should provide their recommendation on whether the CR should or how it could be implemented, indicating approximate timeframe, priority, resource load etc.

Once the assessment body has completed their initial assessment and based on the results the CR will find itself taking a further forking. The majority will be forwarded for validation and implementation estimation.

While those of the larger or more complex nature may require a more indepth analysis. In these cases, as a task team study requires much effort and resource, it would be prudent to verify that it is of interest to the Membership to invest in this study. A membership survey could be initiated to resource and enable the study to commence.

The CR Manager must ensure that a status update is included in the CR entry to ensure people are aware of progress.

Maturity level at this point will typically be a level 1.


Owner

Name	Description	Type
 CR Manager		Role



5.3 Assign to correct analysis team

At this point the CCG have determined if a short validation is required or a more indepth analysis by a single of group of experts. Depending on the complexity of the work request, it may have to be assigned to a task team which will draw from other groups such as the Team Leaders Group, SPLC, etc.for further breakdown & analysis. Or directly to the most likely implementing teams for validation and rough estimate of required work & realistic timeframes.

Incoming Links

Name	Description	Link Label
 Access Work Request		Work request

Outgoing Links

Name	Description	Decision
 Validation of Request		Straight forward items
 Task team creation and Assessment		highly complex work

5.4 Task team creation and Assessment

Work requests which are of an extreme complexity or have far yielding implications on the TM Forum standards will normally be addressed within a task team.

The task team could be generated by a predefined group of people or work as an ordinary development team, putting an open call for participation and setting a Team Leader. In either case, they should conduct minuted meetings etc.

The team has the freedom to address this item as best fits the problem at hand. HOWEVER The team have a timeframe of 3 months in which to complete the assessment and return their final report, which should at a minimum have broken down the issue into manageable bits and indicate the expected implementation effort, priority and urgency.

Maturity Level will typically be a level 1 at this point.

5.5 Validation of Request

Work Requests which are of a mid-level complexity, where by the problem is clearly understood, but potential implementations require validation across one or multiple teams. A quick resource validation is conducted with the appropriate team leaders at this point to assist the CCG in their vote decisions.

A maximum timeframe of 2 weeks to conduct & complete this exercise is set, but it expected that far less time is required.

Maturity Level will typically be a level 1 at this point.

Owner

Name	Description	Type
 CR Manager		Role

5.6 Complete Assessment Report

The CR Manager completes a report, (which contains an impact statement and a next step proposal), and saves this along with all other related materials in the work request system entry, thus making it visible to all. The status is set to Assessment Complete so that it can be included for review and Vote in the next CCG meeting.

For the more complex assessments a detailed word assessment report would be more appropriate, the template can be found <link>

For the more straight forward or fast track items, then it would be appropriate to complete the on line form assessment slot.

Maturity level will typically move to a level 2 at this point as the assessment has complete.

Owner

Name	Description	Type
 CR Manager		Role

5.7 Formal Vote on work request

CCG review the assessment report and if further discussion is required, this can be conducted during the CCG meeting or via community discussion thread.

Once all concerns have been addressed a Consensus is called for, this can be by means of an informal or formal vote against the results of the assessment report or CCG may choose to use a member survey as a mechanism to reach consensus if deemed appropriate.

The Assessment report must make one of the following recommendations.

- a. Approve the CR,
- b. Reject the CR,
- c. Delay the CR as it is presently at a premature level, (giving reasons as to why)

If the recommendation outlined in the assessment report is not accepted, then the CCG need to determine the next appropriate step. These could include conduct further assessment or close the CR.

Consensus result is recorded, (highlighting mechanism used), within the work request system entry and the process proceeds appropriately.

Maturity Level will typically be a level 2 at this point.


Owner

Name	Description	Type
 Change Control Group		Group





5.8 Vote decision

At this point the work request is progressed appropriately.

Incoming Links

Name	Description	Link Label
 Formal Vote on work request		

Outgoing Links

Name	Description	Decision
 Returning to Work Request Rationalization sub-process		Further Assessment
 Reject Request		
 Assign to working group(s)		
 delay item		

5.9 delay item

In this case, the CCG has some reason to delay a decision and this could be that they require further information from either the requestor or the assessors or an other party. Types of reasons and associated timeframes are outlined below.

1. More information from Requestor. (1 day to a max of 1 month depending on complexity of data - if a response is not received within the allocated timeframe the CR can be rejected.)
2. Request is premature at this moment in time (Depending on the level of prematureness, (and based upon strategic plan), the CCG will assign a wait-loop for it. This can be a month, 6 months, a year etc.).
3. The work request is appropriate for immediate implementation, but there just aren't resources to work on the request.

In cases 2 and 3 above, the CCG may feel it appropriate to conduct a member survey to confirm that they have

1. made the correct call
2. or identify resources to work on the work request.

The assigned CR Manager is responsible to ensure the information is received and keeps the CCG and the Requestor updated on progress.

All transactions and information relating to the CR are to be recorded in the system artifact by the CR Manager.

Maturity Level will typically be a level 2 at this point.

Owner

Name	Description	Type
 Change Control Group		Group

5.10 Reject Request

The CR can be rejected for many reasons. Examples of which include: IPR issues, Goes against the TM Forum Strategy, unacceptably worded, etc.

The CR Manager will inform the Requestor of the CCG decision, stating the reasons. the status of the CR will be updated in the tracking tool to have a status of 'Closed -rejected'.

Note: In the event that a requestor of a CR is not satisfied with the decisions made by the CCG, an escalation process is available to them.

Maturity level will typically be a level 2 as assessment will have been complete.

Owner

Name	Description	Type
 Change Control Group		Group

5.11 Escalation Process

In the event that a requestor of a CR is not satisfied with the decisions made by the CCG, an escalation process is available to them, .by submitting their request and reasons for their dissatisfaction to the Technical Committee, no later than 1 month after notification of the decision. The Technical Committee will review the request in light of all the facts and make its decision, which could be one of the following:

1. Agree with CCG
2. Reassess with new information which had not previously been available
3. Technical Committee provide an alternative interpretation of the material already provided so as to assist the CCG in the assessment of the request.

(Note: It is possible that the further information may be required from the requestor, so the submission could iterate around this phase).

5.12 Assign to working group(s)

work request to be assigned to the designated team for implementation.

The CCG need to determine if a team or set of teams currently exist to address the issue.

If **not**, then a recommendation is put forward to the Technical Committee to set-up a new team, who will be required to generate a charter. (Setting up a new team will be addressed in a separate process)

If appropriate teams exist and multiple teams are required to interact to implement the CR then the CCG must determine the appropriate orchestration.

Orchestration across teams can fall into 4 categories namely:

- (1) Complete independence - which will require orchestration only at the delivery stage.
- (2) Simple Serial type orchestration - which requires one team to complete their activity before the next team starts.
- (3) A single team implementing the request, with representation from other teams
- (4) Parallel team activity which have multiple triggers for interaction.

A priority is set against the work order to determine if required for immediate implementation within a fix release or to be included in next or future release.

Decision results are recorded within the work request artifact entry by either the CR Manager or CCG Admin staff.

It should be noted, that an open call to the membership maybe required to request resources to work on these items.


Maturity Level will typically be a level 2 at this point.

Owner


Name	Description	Type
 Change Control Group		Group

5.13 New working Team required?

Incoming Links

Name	Description	Link Label
 Assign to working group(s)		

Outgoing Links

Name	Description	Decision
 Plan & Schedule		No
 Make recommendation to the Technical Committee		Yes

5.14 Make recommendation to the Technical Committee

If a new team is required to conduct this work, then the CCG need to bring this to the attention of the Technical Committee with a justification as to why they should consider setting this team up. It should be noted that the justification would detailed enough to form the basis of a charter if the proposed team were to proceed.

Maturity Level will typically be a level 2 at this point.

5.15 Conduct Member Survey

A Survey can be established, using such tools as Survey Monkey etc. and put before the membership for their thoughts on topics as necessary for the phase of the process. These survies could be set up to address such considerations as:

1. Confirming the priority of work items as per what is important for the industry in general
2. Verifying that it is correct to delay certain work items as premature for the industry at the current moment in time.
3. Poll to see how important a piece of work is for the industry, and if they are willing to supply resources to address it.

Results of the survey will be fed back and adressed by the CCG.

Maturity Level will typically be a level 2 at this point.

Owner

Name	Description	Type
 Change Control Group		Group

5.16 Plan & Schedule

1. The agreed urgency and priority is set against the work request. This is used to determine if the change is required for immediate implementation within a fix release or to be included in the next or a future release. If work is required now, then the team charters are examined to determine if an ammendment is required. If so, then all ammendments are made and approved prior to commecment of the work.

2. A scheduled delivery timeframe and release are agreed and a plan created using the provided tools as appropriate. (e.g. Trackers, task manager etc.)

3. The request then enters the development process.

4.As a default the CR Manager manages the requested change through out the process. However, It is intended that once assigned to a team, the Team Leader will take up ownership of the work request and reiodically, report progress back to the CCG.

Note: Once the change is implemented and verified by the implementing team, it will enter the deliverable approval process - where the CCG as part of the expert reviewers team will verify that it has been implemented correctly.

Maturity Level will typically be a level 2 at this point.

Owner



Name	Description	Type
 Team Leader		Role

5.17 Charter required?

Incoming Links

Name	Description	Link Label
 Plan & Schedule		

Outgoing Links

Name	Description	Decision
 End Work Request analysis & Assignment sub-process		No
 Generate Charter	Create a charter to reflect the work items for consideration and approval	Yes

5.18 Generate Charter

If there was an existing charter, then this should be updated and resubmitted for approval.

If the team was in the process of starting a new phase of work, then the latest charter template (TMF405) should be downloaded and completed and then submitted for approval. The charter should clearly identify if it is new development or maintenance work and in the case of New Development if it is intended to go through the entire development cycle or stop at some earlier point e.g. Business Agreement stage.

To submit a charter for approval. The completed word document must be placed in the 'Submitted Documents folder' of the teams project workspace and an entry made in the 'Project Charter Submission' tracker, linking both together via the associations tab of the tracker entry.

Maturity Level will typically be a level 2 at this point.

Owner


Name	Description	Type
 Team Leader		Role

5.19 Project Approval Sub-Process

The Project Approval sub-process describes the activities necessary for the approval of a new project. A new project could require a new team or a new phase of an existing team.

Refer to the detailed 'Project Approval Sub-process' for complete details.

Owner

Name	Description	Type
 SVP Collaboration Program	Person heading up the Collaboration Program of the TM Forum.	Role

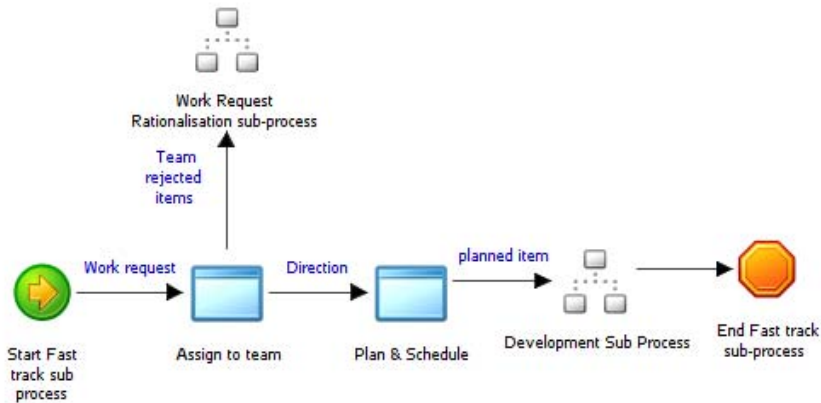
5.20 End Work Request analysis & Assignment sub-process

5.21 Returning to Work Request Rationalization sub-process

6.0 Fast track request Sub Process

Process Narrative

Fast track request Sub Process



Duration of this phase will vary depending on the urgency of the item. It can go from assignment to implementation within a couple of days to weeks - depending on the release it is scheduled for.

The fast track mechanism allows for the quick turn around for work requests which are straight forward in nature and/or are of an urgent nature.

Refer to the Fast Track Request sub-process for details.

Owner

Name	Description	Type
 CR Manager		Role

6.1 Start Fast track sub process

6.2 Assign to team

Work requests can only be fast tracked to a single team or an existing orchestrated set of teams which are currently working on 'the' or highly related activity.

The CR Manager presents the work request to the team giving an indication to the urgency & Priority of the item and the timeframe in which it should be implemented.

The team does a final review and confirms that it is able to address the item in an agreed timeframe. If not or if the work request does not belong within the team scope, then it is returned to the normal process.

6.3 Plan & Schedule

1. The agreed urgency and priority is set against the work request. This is used to determine if the change is required for immediate implementation within a fix release or to be included in the next or a future release. If work is required now, then the team charters are examined to determine if an ammendment is required. If so, then all ammendments are made and approved prior to commecment of the work.

2. A scheduled delivery timeframe and release are agreed and a plan created using the provided tools as appropriate. (e.g. Trackers, task manager etc.)

3. The request then enters the development process.

4. As a default the CR Manager manages the requested change though out the process. However, It is intended that once assigned to a team, the Team Leader will take up ownership of the work request and reiodically, report progress back to the CCG.

Note: Once the change is implemented and verified by the implementing team, it will enter the deliverable approval process - where the CCG as part of the expert reviewers team will verify

that it has been implemented correctly.

Maturity Level will typically be a level 2 at this point.

Owner

Name	Description	Type
 Team Leader		Role



6.4 Development Sub Process

During this phase of the project, the project team must operate within the scope of the approved project charter and according to the TM Forum by-laws and IPR rules as defined in the Operating Guide.

This section focuses on agreeing to the exact format of the deliverables, creating the deliverables and ensuring initial quality assurance is completed.

Refer to the detailed 'Development Phase' sub process for complete details

Owner

Name	Description	Type
 SVP Collaboration Program	Person heading up the Collaboration Program of the TM Forum.	Role
 Team Leaders Group		Group

6.5 Work Request Rationalisation sub-process

Within this sub-process the more complex work requests are put forward for initial assessment by the complete CCG and from here it will get routed down the most appropriate path. This could be to be deferred, rejected or continue on for further analysis/investigation, and assigned to the appropriate investigating body. At this point the bulk of work requests will go for further assessment.

This phase should be completed by 2 weeks of request submission.

Maturity level of work requests at this phase would typically be of a level 1, Request such as Fast track items, which would have completed their assessment phase would be upgraded to maturity level 2.

Refer to the Work Request Rationalisation Sub-process for complete details.

Owner

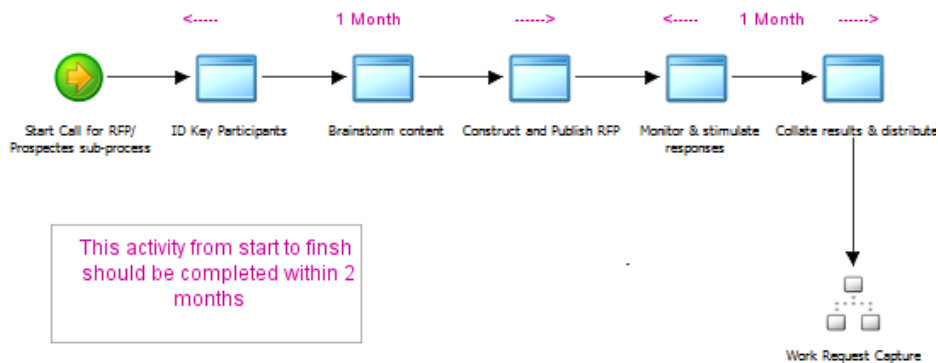
Name	Description	Type
 CR Manager		Role

6.6 End Fast track sub-process

7.0 Call for RFP/Prospectes

Process Narrative

Call for RFP/Prospectes



7.1 Start Call for RFP/Prospectes sub-process

7.2 ID Key Participants

Where possible this activity should be led and generated by the TM Forum Membership but in the event of resource shortages, TM Forum Staff will assist as appropriate.

7.3 Brainstorm content

Based upon the input sketch presented, the team need to gather idea's that will enable the construction of a compelling message to the industry which will stimulate the generation of relevant input material and bring necessary participation to enable the TM Forum to take the next step of standardisation.

7.4 Construct and Publish RFP

Complete the RFP template as appropriate, review material with sponsors and publish -

(Need to define the template and the mechanism to publish it! Publish mechanism should be the same as that for Member Survey and must go to the principal contact of all member companies.)

7.5 Monitor & stimulate responses

Having sent the RFP it is important that the originators ensure that the RFP is understood by the community and the timeframe is adhered to. It is also important that the Member companies who are expected to respond, realise that they have the RFP and are encouraged to respond in time.

7.6 Collate results & distribute

After the response cut-off time, all responses / proposals are collated and submitted as a set back into the Work Request Capture sub-process.

7.7 Work Request Capture

Work requests entered via the online form are automatically stored in a central repository. From here it is sanity checked by TM Forum staff and the appropriate Maturity level, (default 1) is set. It is then assigned and forwarded to a CR Manager who will manage it through the remainder of its life.

A quick pre-assessment is conducted by the CR Manager to ensure straightforward items can be addressed quickly and more complex ones are sent for more detailed analysis. Approx 10% of the requests will complete its assessment at this phase of the process.

The duration of this phase should be a 1 to 2 days.

Maturity level for items in this phase would typically be of a level 1 (IPR and other sanity checks having been completed).

Refer to the Work Request sub-process for more details.

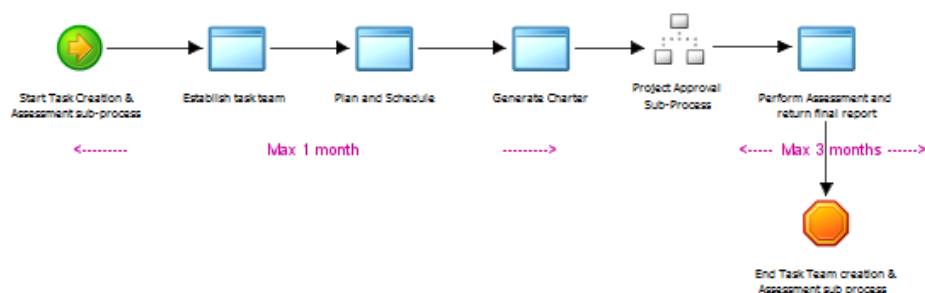
Owner

Name	Description	Type
 CCG Admin		Role

8.0 Task team creation and Assessment

Process Narrative

Task team creation and Assessment



Work requests which are of an extreme complexity or have far yielding implications on the TM Forum standards will normally be addressed within a task team.

The task team could be generated by a predefined group of people or work as an ordinary development team, putting an open call for participation and setting a Team Leader. In either case, they should conduct minuted meetings etc.

The team has the freedom to address this item as best fits the problem at hand. HOWEVER The team have a timeframe of 3 months in which to complete the assessment and return their final report, which should at a minimum have broken down the issue into manageable bits and indicate the expected implementation effort, priority and urgency.

Maturity Level will typically be a level 1 at this point.

8.1 Start Task Creation & Assessment sub-process

8.2 Establish task team

The task team can be generated by a predefined group of people or work as an ordinary development team, putting an open call for participation and setting a Team Leader. In either case, they should conduct minuted meetings etc. and following the working principals of any other team.

8.3 Plan and Schedule

1. A work breakdown is established and a scheduled delivery timeframe and release are agreed and a plan created using the provided tools as appropriate. (e.g. Trackers, task manager etc.)

Maturity Level will typically be a level 1 at this point.

8.4 Generate Charter

The latest charter template (TMF405) should be downloaded and completed and then submitted for approval.

The charter should clearly identify that it is a evaluation or exploration type of project.

To submit a charter for approval. The completed word document must be placed in the 'Submitted Documents folder' of the teams project workspace and an entry made in the 'Project Charter Submission' tracker, linking both together via the associations tab of the tracker entry.


Maturity Level will typically be a level 1 at this point.

8.5 Project Approval Sub-Process

The Project Approval sub-process describes the activities necessary for the approval of a new project. A new project could require a new team or a new phase of an existing team.

Refer to the detailed 'Project Approval Sub-process' for complete details.

Owner

Name	Description	Type
 SVP Collaboration Program	Person heading up the Collaboration Program	Role

of the TM Forum.

8.6 End Task Team creation & Assessment sub process

8.7 Perform Assessment and return final report

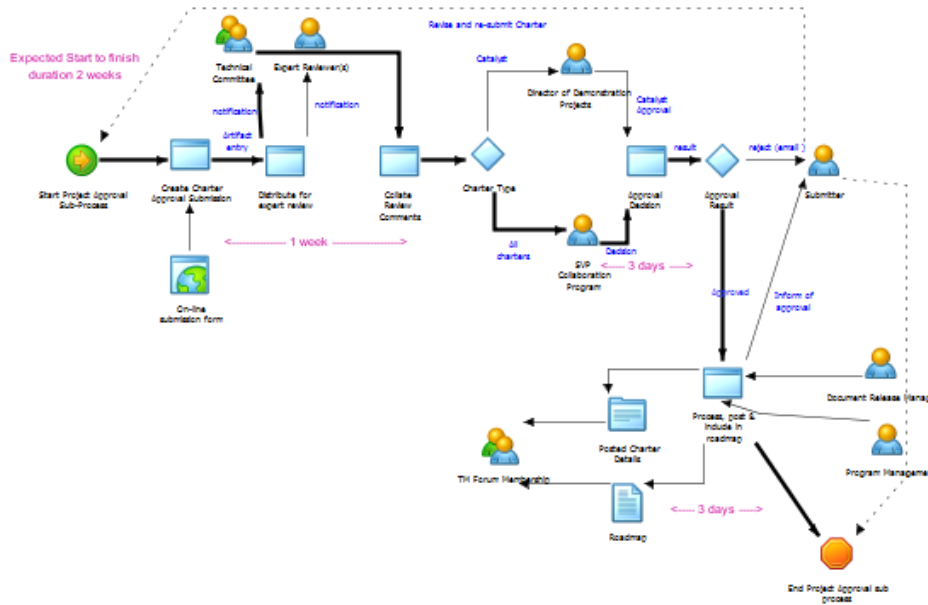
Once approval has been granted to proceed with the exploration work, The team has the freedom to address this item as best fits the problem at hand. HOWEVER The team have a timeframe of 3 months in which to complete the assessment and return their final report, which should at a minimum have broken down the issue into manageable bits and indicate the expected implementation effort, priority and urgency.

Maturity Level will typically be a level 1 at this point.

9.0 Project Approval Sub-Process

Process Narrative

Project Approval Sub-Process



The Project Approval sub-process describes the activities necessary for the approval of a new project. A new project could require a new team or a new phase of an existing team.

Refer to the detailed 'Project Approval Sub-process' for complete details.

Owner

Name	Description	Type
SVP Collaboration Program	Person heading up the Collaboration Program of the TM Forum.	Role

9.1 Start Project Approval Sub-Process

9.2 Create Charter Approval Submission

Team agree the contents of their charter, in particular the deliverable list and scheduled dates.

Assigned team member, (usually the Team Leader) completes the charter template (TMF405) and stores in a working folder of the documents tab of their project workspace.

Once the charter is ready, the document needs to be moved (via Cut & Paste) into the Submitted documents folder of the document tab, and a project charter submission request generated.

This is done by creating a new artifact in the 'Project Charter Submission' Tracker, a link is available from the communities and completing the required fields. The charter document and request submission are linked together via the associations tab. Once saved, the request is automatically routed into the approval process.

Guidelines on how to complete the charter are available in the template with optional sections clearly identified.

Guidelines on how to create a Project Charter Submission entry within the tracker are available via the community/tool.

Owner

Name	Description	Type
Team Leader		Role

Performed By

Name	Description	Type
Submitter/Requestor	Person or team who have submitted the request.	Role

9.3 On-line submission form

9.4 Distribute for expert review

The submission is taken, usually by the CP Program Manager and the appropriate review and approval dates are set. Expert reviewers are notified by means of the contacts facility via the community and through the on-line reports which are available.

Expert reviewer have 1 week in which to review and return any comments & suggestions they may have. All comments are to be entered directly into the system by:

1. select the link (either in the Artifact ID or Title column) to open up the entry on the screen.
2. Then provide any feedback into the 'comment box' to the left of the displayed screen,
3. (Attachements can also be included in the field underneath.)
4. and select the 'update' button.


9.5 Collate Review Comments

As all comments should have been entered directly into the charter submission, they will be automatically accessible from the history of 'comments' section of the artifact entry.



9.6 Charter Type

There are two types of charters - one for demonstration projects and then, all the others.

Incoming Links

Name	Description	Link Label
 Collate Review Comments	All comments related to a charter submission are gathered together	

Outgoing Links

Name	Description	Decision
 SVP Collaboration Program	Person heading up the Collaboration Program of the TM Forum.	All charters
 Director of Demonstration Projects	Person heading up the Demonstration Program area.	Catalyst

9.7 Approval Decision

The submitted charter is reviewed and all returned 'expert review comments' are considered.

In the Event of a Catalyst Project the approving party is made up of the Director of Demonstration projects and the SVP of Collaboration Program.


For all other charters the approval decision is made by the SVP of Collaboration Program.

Approvers are given 3 days from end of expert review period to make their decision.



9.8 Approval Result

Is charter approved for implementation or not

Incoming Links

Name	Description	Link Label
 Approval Decision	Approving parties review charter & returned comments and makes decision.	result

Outgoing Links

Name	Description	Decision
 Submitter/Requestor	Person or team who have submitted the request.	reject (email)
 Process, post & include in roadmap	Final processing of a charter after approval received	Approved

9.9 Process, post & include in roadmap

The approving team updates the charter entry with the results of their decision and enters any

comments or actions they may have. The entry is then routed back to the Program Manager for final processing.

The charter details are incorporated into the overall CP roadmap and tracked by the Program manager and will ensure that the approved charter is made available to the membership

9.10 Roadmap

This is the complete roadmap for the Collaboration Program and is available from:
<http://collab.tmforum.org/sf/go/doc3395?nav=1>

9.11 Posted Charter Details

The final charter document which will be posted on the TM Forum web page, (www.tmforum.org), displaying from the Charter section of the document library and the particular team area.

9.12 Director of Demonstration Projects

Person heading up the Demonstration Program area.

9.13 Submitter/Requestor

This is a generic role to depict the person or team who has submitted the request for modification or for approval, whichever is appropriate.

9.14 Program Management

Person who manages and maintains the Collaboration Program roadmap.

9.15 TM Forum Membership

Members of the TM Forum

9.16 Document Release Manager

Person in charge of the final processing & posting of the charters or other deliverables.

9.17 SVP Collaboration Program

Person heading up the Collaboration Program of the TM Forum.

9.18 Expert Reviewer(s)

This role is generally held by the Team Leaders Group, Change Control Group, Service Provider Leadership Council and the various Sector heads.

9.19 Technical Committee

The chief duties of this committee are to develop the strategic plan in collaboration with the members. It also provides advice and guidance to the board, participates in the review and approval of project charters and deliverables as well as input to the Strategic Operating Plan

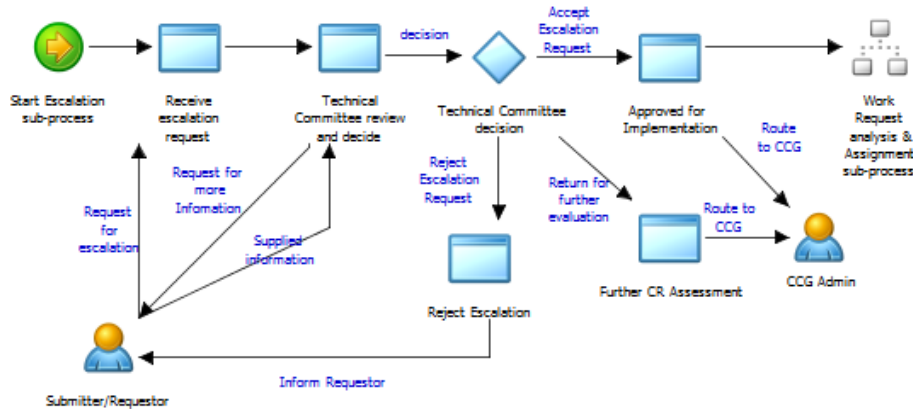
9.20 End Project Approval sub process

end of the project approval sub process.

10.0 Escalation Process

Process Narrative

Escalation Process



In the event that a requestor of a CR is not satisfied with the decisions made by the CCG, an escalation process is available to them, by submitting their request and reasons for their dissatisfaction to the Technical Committee, no later than 1 month after notification of the decision. The Technical Committee will review the request in light of all the facts and make its decision, which could be one of the following:

1. Agree with CCG
2. Reassess with new information which had not previously been available
3. Technical Committee provide an alternative interpretation of the material already provided so as to assist the CCG in the assessment of the request.

(Note: It is possible that the further information may be required from the requestor, so the submission could iterate around this phase).


10.1 Start Escalation sub-process

10.2 Receive escalation request




10.3 Technical Committee review and decide

10.4 Technical Committee decision

Incoming Links

Name	Description	Link Label
 Technical Committee review and decide		decision

Outgoing Links

Name	Description	Decision
 Approved for Implementation		Accept Escalation Request
 Further CR Assessment		Return for further evaluation
 Reject Escalation		Reject Escalation Request

10.5 Submitter/Requestor

This is a generic role to depict the person or team who has submitted the request for modification or for approval, which ever is appropriate.

10.6 Reject Escalation

10.7 Approved for Implementation

10.8 Further CR Assessment

10.9 CCG Admin

TM Forum Staff assigned to assist the Change Control Group.


10.10 Work Request analysis & Assignment sub-process

Within this phase, The stakeholders, (who could be a single person or a team of people depending on complexity of the request), review the work requests and provide an assessment, (which can be a single line in the requestor tracker or a detailed report - once again, depending on complexity of request), on their findings & recommendations. These return to the CCG where they are rejected or allocated to existing projects or a proposal to start the procedure to initiate a new project.

Duration of this phase can take from 1 day to 3 months depending on completeness. Once work request have completed their assessment, they will have progressed to a Maturity level 2.

Refer to the detailed 'Requirements Analysis and Assignment' Sub Process for complete details.

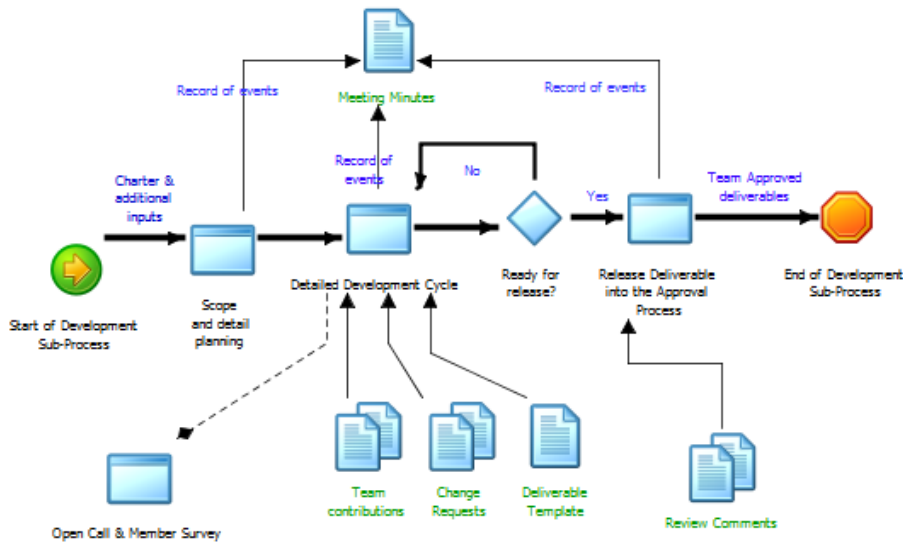
Owner

Name	Description	Type
 Change Control Group		Group

11.0 Development Sub Process

Process Narrative

Development Sub Process



duration varies per project but should be no longer than 1 year.

During this phase of the project, the project team must operate within the scope of the approved project charter and according to the TM Forum by-laws and IPR rules as defined in the Operating Guide.

This section focuses on agreeing to the exact format of the deliverables, creating the deliverables and ensuring initial quality assurance is completed.

Refer to the detailed 'Development Phase' sub process for complete details

Owner

Name	Description	Type
SVP Collaboration Program	Person heading up the Collaboration Program of the TM Forum.	Role
Team Leaders Group		Group

11.1 Start of Development Sub-Process

11.2 Scope and detail planning

Team leader calls the team and ensures that there is sufficient resources and commitment to work on this phase of the project.

The work is scoped and a detailed plan is agreed by the team members.

The team commences by defining the deliverable framework, i.e. the type of key documents/deliverables that are planned to be delivered. It is possible that the team may find that they need to change the type, add or delete a planned deliverable through the development phase of the project. The work may also include updates to an existing set of documents.

During this phase the team may realise that modifications may be required to the charter or additional Change Requests generated in order to completely define the work which they have been asked to address.

The team leader begins to allocate tasks across the various members of the team and agree the tooling which will be used.

This activity completes with an agreed detailed plan. This plan can be documented using the tools which are available on the project workspace (e.g. Task Manager and/or Tracker Manager) or other project management tools which the team are comfortable with, (and aligned with the tooling program). However, even these plans need to be stored & maintained

on the project workspace under the document tab. Examples of suitable formats include PDF version of Microsoft Project, Excel documents, etc.

Maturity level of the work request will typically be a level 2 at this stage.

Owner

Name	Description	Type
 Team Leader		Role

11.3 Meeting Minutes

These are a mandatory requirement of each project team. Minutes are recorded in a word document or other suitable format using a standard pro forma capturing at a minimum the following key items:

1. A meeting title, (with optional summary if title is not obvious)
 2. Attendee List and Apologies list
 3. Meeting Agenda
 4. Call for IPR
 5. key discussion points,
 6. votes called for and results of same,
 7. decisions/agreements made during the meeting
 8. URL of documents/request which were reviewed/discussed.
 9. Actions (these can be captured and eventually stored in the tracker tool on the Project Workspace as appropriate).
 10. Other items relevant to the meeting/activity
- (note: a template is available if required (see attached and will be posted in the templates area of the web))

Meeting minutes and actions are documented by the Team Leader or assigned person and announced via the community and stored on the Team Project Workspace under the documents tab, in a folder titled "Meeting Minutes".

NOTE: The agreed minutes should be frozen. All meetings should start with a request for any comments on last weeks minutes

11.4 Detailed Development Cycle

Please note: the interaction between this and the next process phase have been greatly simplified. It is intended that the major aspects of the development process will be touched on here, but It should be realised that there is an expectation that the development process will be described in further detail and diagrams by the project teams involved in the development.

There are several main perspectives by which this activity can be viewed, namely:

- **Use of tooling**
- **Project Management of this phase**
 - o Running Meetings
 - o Use of Sub-teams & their creation
- **Development of the actual deliverables**
 - o Extracting contributions/input from the team
 - o Creating the material
 - o Reviewing worked material.
- **Reference of Deliverables and other information provided through the project team.**

It is important to realise that these perspectives are not clear cut but rather intertwine. Let's begin by looking at each of these perspectives.

Use of tooling

It is difficult to split this out as a separate discussion item, so it will be addressed within the bodies of the other perspectives - with suggested or mandatory tooling options identified.

Project Management of the development phase of the project:

This section addresses the some of the Project Management aspects for running a project. It identifies the key tasks expected of the Team Leader, support by TM Forum Staff.

- Assisted by TM Forum staff, the Team Leader co-ordinates the plan agreed during the previous process phase.
- It will be the responsibility of the Team Leader to ensure meetings are organised and announced appropriately to ensure the work is progressing. (see running meetings below)
- For each planned item, it must be decided if the work will be conducted by the main body or a sub-team. (see below) and this should include considerations of interactions between various teams, (e.g. sub-teams, other program teams, or any other type of team).
- In addition to running the meetings and ensuring the planned tasks start and complete according to the schedule, the Team Leader, (assisted by TM Forum Staff) will also oversee the administrative activities of:
 - o Raising out of scope change requests to advertise & track work items which may have

been missed during the initial planning phase. This will be done by selecting the 'Change Request' link available throughout the communities and completing the on-line form. To assist with containment of out of scope work the team lead should call on the Architecture & Technical Coordination focus (A&TC). This may result in a short study of the area .

o Raising show stopper issues, which are items that are immediately preventing the team from progressing. An official record of the issue should be created by raising a Change Request and followed up by placing it on the agenda of the appropriate level of escalation, (see below). Again the AT&C can be called in to assist if appropriate.

o Intermediate deliveries - In the event that the team have agreed to share an early version /sections of the work with the broader TM Forum membership, then:

the Team leader must make sure it is of an appropriate quality level to be shared with the general membership.

He/She must ensure it is made available to the CCG and TM Forum members for consideration / initial feedback.

Ensures that it is set with a Maturity level 1

How to create intermediate deliveries is outlined below.

o Final deliverables are of the appropriate quality, use the correct format & template and are submitted into the approval process correctly Refer to the approval sub-process for details.

• In addition to raising CRs the team could receive further CRs from the CCG which relate to the work the team are conducting. The Team Leader and potentially some team members must agree to assist with the analysis of those and/or implementation where appropriate.

• The Team Leader and Staff support should

1. direct/assist the team with the storage and sharing of all 'work in progress' material.

2. ensure that all communications/discussion are held on the community platform

3. ensure team follow the processes appropriately.

Running Meetings

1. The Team Leader MUST remind their team of the IPR agreement at the beginning of each meeting and calls for any IPR to declare.

In addition: All meetings should start with a request for any comments on last weeks minutes and the agreed minutes should be frozen.

2. Each meeting MUST be minuted. Minutes are recorded in a word document or other suitable format using a standard pro forma. These are documented by the Team Leader or assigned person and stored on the Team Project Workspace under the documents tab, in a folder titled "Meeting Minutes".

(see below for further details)

3. Meeting appointments should be set-up using the community calendar; these can be set-up as a recurring item, if it is a regular timeslot. Each individual meeting can then be updated in advance to reflect the agenda for that particular instance.

4. The team meet regularly (via conference call, or in person as appropriate) to raise, progress and solve the issue at hand. These can be document as part of the working documents, (see tooling section below). It should be noted that the Team Leader will maintain an expected attendance list that will relate to the list of people who stepped forward for the team. The team leader (and TM Forum Staff) will track attendance and escalate issues if the team drops below a critical mass.

Note: material for the meeting may be presented directly at the meeting where an overview and discussion is all that is expected. If the material is being presented for review and approval it should be provided prior to the meeting and the members of the team alerted.

Sub-team organisation & management

If the work is large and can be decomposed into separate elements at an early stage of the project, then a sub-team can be considered. Then the team membership will be called to identify areas which are suitable for them to work on and appropriate sub-team(s) created. These will act in the same fashion as the main body – with a sub-team leader being appointed to manage the activities, run meetings as per team meetings with minutes and IPR requests. Sub-teams will live for the duration of the work item and will be disbanded on final delivery, at which point the main team become responsible for that area of work.

Development of the actual deliverables:

This section looks at how the team goes about gathering the information to create the final deliverable. This basically follows 3 steps

1. Extract the information/data from the team in any suitable format

2. Create the final deliverables in the official TM Forum format

3. Review, finalise and agree that the deliverables continue into the formal approval process.

It is the intention of this section to go through each of these bullets to identify the tooling & storage facilities to be used and identify any best practices identified by teams.

Extracting contributions/input from the team

In this section we are talking about input generated from within the team.

Starting from a specific task, the Team Leader either discusses during a meeting or via the community discussion facility the issues and scope of the task and solicits questions & input

from the team. All discussions are captured in a wiki or other appropriate document form and if verbally raised in a meeting, it must be recorded in the minutes.

As the team progress the material, sections can be developed using the tool appropriate to the workings of the particular team. Team submissions can be presented in advance or generated during a meeting. Depending on the media or format used, the submissions must be stored appropriately as described below:

Text: - e.g. word, excel, PowerPoint etc. For these a clearly titled Folder is created in the documents or Source code area, (as appropriate), of the project workspace and the document uploaded and version controlled there.

Diagram: These should be stored and version controlled under the appropriate folder of the document tab or Source code as appropriate.

Code: These must be submitted and version controlled using SVN in the source code area of the project workspace.

Model: These must be submitted and version controlled using SVN in the source code area of the project workspace.

Questions/Discussions: If these tools of the community are used to edit sections of the deliverable or expand concepts, then the final result needs to be extracted, stored and version controlled in a format more suitable to the creation of an final deliverable, like a wiki or word document, and linked back to the phase of the project.

Note - IPR: Any contributions by members to the project deliverable development must follow the submissions and Patent Disclosure processes as outlined in the Operating Guide

Creating Final deliverables

As the work matures, the team will consolidate the individual bits into the structure & format of the final deliverable. A person is selected to act as editor. By default the Team Leader accepts the role of Editor until assigned to another team participant.

As the final deliverable will typically be one or a combination of the following formats, and are handled as follows:

Document:

If it is a continuation to an existing document, then the document version is updated as outlined in the Document Release Numbering Process. The document is checked to ensure it is consistent with the latest version of the template and modified appropriately

If a new document, then the appropriate template is downloaded from the template area of the 'Document Library' on www.tforum.org

The Team Leader or Staff support request a document number from the Document Release Manager, providing him/her with the team name, document type and title of the proposed document .

The document is then developed using the template as a guideline but maintaining the cosmetic format and style.

Document is stored and version controlled in the documents or source code area of the project workspace, in a clearly defined working folder.

Code and Information Process Models: will be constructed using tools agreed within the team aligned with the recommendations of the Tooling Program and stored under SVN control in an appropriate directory agreed by the team under source code tab.

Reviewing worked material.

1. Team Leader/Editor releases Project Deliverable to the team and if appropriate to other Peer Teams. He/she informs them of where to find the document(s) on Project Workspace along with any other review details, i.e. comment period and review meeting date, comment method e.g. web communities, use of Project Workspace review mechanism etc. The originator should endeavour to deliver the document at least 5 days before the meeting and notify the team with a link to the document, (which includes the correct version and automatic assigned number) , using the contact facility.
2. The Reviewing Team(s) return comments via the agreed method within the allotted time.
3. The Team agrees on acceptance/rejection of comments. This can be done via the communities or a meeting as agreed by the team. If comment is accepted, then Editor includes the contributors name in the Contribution List section of the document and Team Leader ensures the contribution process is followed, (see Operating Guide).
4. The Editor updates the deliverables and calls for a another round of review if required. The deliverable can iterate around this phase a number of times until the team are satisfied that the appropriate quality level has been achieved. Note: Intermediate releases of the material can be distributed to the TM Forum membership thorough out this phase as seen fit by the team.

5. Once all reviews are complete, the team must vote to agree to submit the final team version into the approval process. The vote and outcome must be recorded as either a separate activity or in the minutes of the team meeting where agreement was reached.

Note: A set of release notes for the document/suite must be completed for and packaged with each new release of the work, (i.e. template TMF409). The TM Forum staff support will assist with the completion of these deliverables, gathering up the review results etc and filling in the templates.

Deliverables and other information provided through this activity

The intention of this section is to give a place of reference for the different outputs which can be generated from within a team. For each one a description on how to generate and where to store these will be provided. The most common list of outputs tend to be:

Minutes:

These are a mandatory requirement of each project team. Minutes are recorded in a word document or other suitable format using a standard pro forma capturing at a minimum the following key items:

1. A meeting title, (with optional summary if title is not obvious)
 2. Attendee List and Apologies list
 3. Meeting Agenda
 4. Call for IPR
 5. key discussion points,
 6. Any consensus called for, (either informal or formal vote as appropriate), and results of same recorded.
 7. decisions/agreements made during the meeting
 8. URL of documents/request which were reviewed/discussed.
 9. Actions (these can be captured and eventually stored in the tracker tool on the Project Workspace as appropriate).
 10. Other items relevant to the meeting/activity
- (note: a template is available if required (see attached and will be posted in the templates area of the web))

Meeting minutes and actions are documented by the Team Leader or assigned person and announced via the community and stored on the Team Project Workspace under the documents tab, in a folder titled "Meeting Minutes".

NOTE: The agreed minutes should be frozen. All meetings should start with a request for any comments on last weeks minutes

Input material from outside the project team:

This can be further broken down into, but not limited to:

Change Requests: Requests for change which have been routed and approved for implementation through the CCG. Change Requests details are captured by using the on-line form available via the community and stored in a common database, (i.e. Request tracker) and the details are then accessible by all TM Forum members via the communities.

External Submissions: These are worked suggestions/solutions/ideas which have been routed through the CCG, linked to a change request and approved for inclusion in the formal TM Forum standards.

Again these details are stored in a common database, (Request tracker) and available to all via the communities.

It should be noted that it is possible for TM Forum Members to make a submissions which will not be integrated into the final TM Forum standards but are valid in their own right and will be available via the communities for use by the TM Forum membership, bearing in mind that they are of a maturity level 1.

Intermediate deliverables:

These are early or Team Draft versions of either the complete or sections of the final deliverables which the team feel are either at a stage to be used by the Members, or the Team require early feedback on.

The presented format of the material will typically be that of the tooling used to create it, e.g. Wiki Page, word document etc.

The contributions tab of the community will be used to submit this to the CCG for their expert review and will be made available via the downloads area of the community for general membership access.

The membership are then free to return comments or indeed use within their organisations, but must be aware that these contributions are of a maturity level 1.

Team Review comments & results:

If the project workspace provided review tools are used, then all comments will be automatically captured, stored and linked back to the correct version of the document out for review. If other tools are used, then the Team Leader/Editor must ensure they are captured & stored in a format which can be stored in the folder alongside the reviewed document and link them via the associations tab.

Formal Deliverables:

- **Final Text Documents**

Once finished, the final text document should be placed by the Editor into a folder titled 'Submitted Documents' under the documents tab of the project workspace. In order to maintain the complete version history, it should be 'cut' from the working directory and pasted into the Submitted folder. Placing it here allows the DRM to be confident that the correct version is being selected and not an earlier working draft version.

From here the DRM will extract the latest and correct version, process and then baseline it into the 'Approved Documents' Folder, ensuring an association is made back to the approval request. (It should be noted that currently the baseline is maintained under the projects own documents tab - but a suggested central baseline storage is being discussed). The baseline allows the team the confidence to extract the correct version for future releases, and also maintains a record of which version was published on a release basis.

Finally, an appropriate entry will be created in the file release area, which is linked back to the appropriate approval request via the associations tab.

Final Code and Information Process Models: Once finished the version of code or model should be recorded and the code/model should be copied to a "Final for approval" stream (still in an SVN repository {suggest this be central repository}). Development may then continue on the code or model in preparation for the next release as appropriate. As the reviewers may not have access to necessary tools a reviewer friendly version may need to be generated automatically using the tooling and necessary scripts etc (in HTML, MS Word etc) that assists in the review process. This should be kept in the same SVN repository with the "Final for approval" model. A mechanism for merge changes back into the ongoing development streams will need to be developed on a per tool basis.

Issues & challenges:

During the project the team have to be ever mindful of closing down discussions and moving the appropriate decisions into the work of the team or change requests for other phases or indeed other teams. Questions raised need to be addressed to the satisfaction of the person who asked it etc.

Agreed escalations:

During a project an item may be found to be unexpectedly complex or a new area may be encountered that is was not described in the scope of the work but that appears to necessary for work to continue etc. At this point the project team should consider escalation and should call on A&TC for assistance. A&TC will provide a broad perspective and may be able to help resolve the issue within the broader scope of ongoing work. If A&TC in conjunction with the team do not resolve the issue in a reasonable time frame (1 month) then the team with the support of A&TC will escalate back to the CCG.

Liaison:

If the team has work that it feels would be beneficially liaised to another standards body it may do this through the liaison group. A&TC may be involved in this process as appropriate.

Maturity level of the work request will typically be a level 2 at this stage

Owner



Name	Description	Type
 Team Leader		Role

11.5 Ready for release?

Incoming Links

Name	Description	Link Label
 Detailed Development Cycle		

Outgoing Links

Name	Description	Decision
 Release Deliverable into the Approval Process		Yes
 Detailed Development Cycle		No

11.6 Release Deliverable into the Approval Process

To initiate the approval process,

The Editor posts the deliverable as appropriate:

- Documents - in the 'Submitted Documents' folder in the documents tab of the project workspace. The complete version history should be placed there and this can be achieved by cutting the document from the working directory and pasting it into the Submitted documents folder.

- Code and Information Process Models - Within the Source code area using the SVN tool. An on-line Approval Submission form is completed and an association created linking the Approval request back to both the deliverables and all Change Requests (etc.) addressed in that release.

On creating/(saving) the approval request, the entry will automatically route to the approval sub-process.

Maturity level of the work request will typically be a level 3 at this stage as the work has been implemented.

Owner

Name	Description	Type
 Team Leader		Role

11.7 Review Comments

These are the comments / suggestions returned during the review process. These may be in line or separate depending upon the tools used and the process agreed by the team etc.

11.8 Change Requests

Changes approved that define the scope of the work to be carried out.

11.9 Team contributions

ongoing work in the team ranging from whole submissions from members of the team that are fully in scope of the approved work to an edit on a wiki are all covered by the team charter and hence by the standard member agreement and IPR statements. All material submitted directly to a team is considered to be of the type Forum Working Document (as per the agreement). Any IPR related should be declared using the appropriate template

11.10 Deliverable Template

Hyperlink

URL / File Path

 <http://www.tmforum.org/TemplatesandForms/866/home.html>

available from the document library section

11.11 End of Development Sub-Process

11.12 Open Call & Member Survey

In the event that Resource levels have dropped and it is not possible to implement/deliver the work request the Team Leader with the assistance of the CCG can either:

- 1) Return to the requestor of the work item looking for verification of the importance of the work item and a request for resources to complete implementation.
- 2) Conduct a Membership survey (via survey monkey or other such tool), to determine/validate the importance of the work and perform an open call for resources to complete the work.

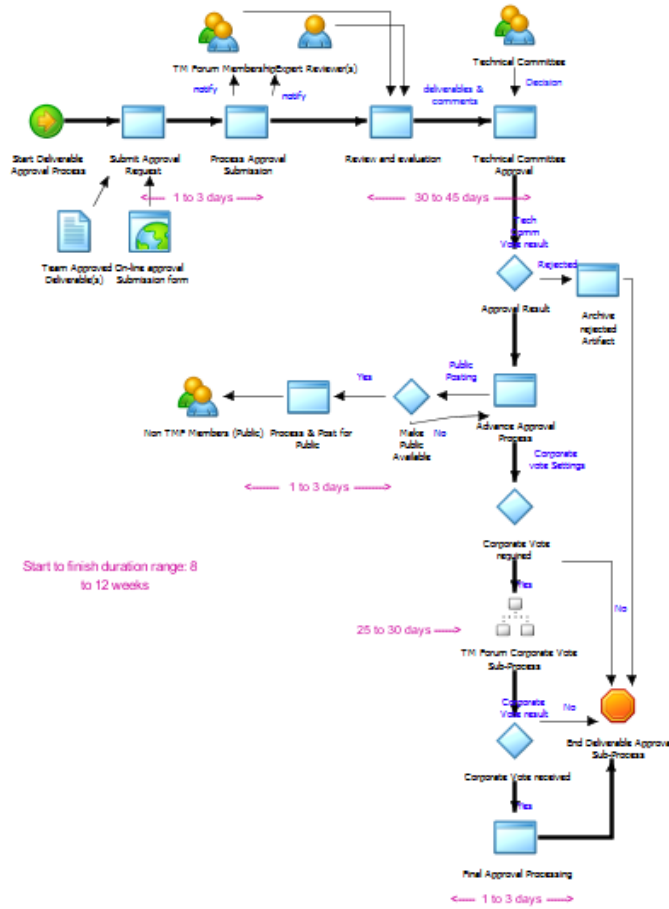
Owner

Name	Description	Type
 Change Control Group		Group
 Team Leader		Role

12.0 Deliverable Approval Sub Process

Process Narrative

Deliverable Approval Sub Process



Once Collaboration Project artefacts are submitted for approval, this process flow outlines the steps which it must undergo in order to achieve approval and it identifies the roles & groups who are required to take part in those steps.

Refer to the 'Deliverable Approval Sub Process' for details.

Owner

Name	Description	Type
Program Management	Person who manages and maintains the Collaboration Program roadmap.	Role
Technical Committee	Sub-committee of the board that provides the detailed technical strategy and guidance for technical projects	Group

12.1 Start Deliverable Approval Process

12.2 Submit Approval Request

Once a Project Team or appropriate body agree (consensus reached as appropriate by discussion or a Team vote), that specified artefacts are at the appropriate level of maturity (Level 3 - Team Approved) to be considered for TM Forum approval a submission is made by conducting the following steps:

1. Project Team conducts quality check on material (both technical and cosmetic content) and make final updates.

2. Within the document repository (Document tab of project workspace) the Project Leader/Editor places copies of the 'Team Reviewed' artefacts into the 'Submitted for Approval' directory. This can be done using the 'Cut & Paste' functionality of the tool, in order to maintain the full version history of the document).

(note 1 : if code then it will be in the source area of the project workspace)

(note2: Project Leader in cases where there are more than 2 artefacts, they must ensure a set of release notes, (template is TMF409) are generated and included with the pack. TM Forum Staff will assist with its creation.)

3. Project Leader completes the on-line Approvals Submission

(http://collab.tmforum.org/sf/tracker/do/createArtifact/projects.collaboration_program_centre/tracker.approval_submission)

request form and submits it, which will automatically trigger the approval process.

4. Project Leader must ensure appropriate CR's (Request submissions) and delivered artefacts are linked to the Approvals request using the associations' feature.
5. Entry should be assigned to the Collaboration Program Manager

Owner

Name	Description	Type
 Team Leader		Role

12.3 On-line approval Submission form

Hyperlink

URL / File Path

 [http://collab.tmforum.org/sf/tracker/do/createArtifact/projects.c ...](http://collab.tmforum.org/sf/tracker/do/createArtifact/projects.c...)

hyperlink to On-line approval submission form.


12.4 Team Approved Deliverable(s)

12.5 Process Approval Submission

The following are the list of activities which are undertaken to ensure the submission continues correctly through the approval process.

1. The Program Manager reviews submission, sets review dates & recommendations appropriately and informs the Expert reviewers. In addition, the CP roadmap is updated appropriately.
2. DRM will automatically be notified of a new submission, and will conduct final quality check on the deliverables and then convert to PDF setting the appropriate security settings.
3. The DRM will baseline the material into the 'Approved Documents' folder of the team's project workspace. This will form the baseline for this release and can be used as the foundation for the development of the next release. This entry should be linked back to the original request by creating an association in its approval tracker entry.
4. The DRM will then create the appropriate release definition within the 'File Release' tab of the Team's project workspace environment. PDF and word versions to be posted there. The DRM will ensure filenames etc. follow agreed standards etc. Once again an association between the entry in the File Release Area and the approval tracker entry is made. By doing this the processed artefacts should automatically be available to the downloads area
5. Finally, the processed artefacts are also posted to the TM Forum web page, using the provided templates on the 'Content Manager'. These will be made accessible from the following areas at a minimum:
 - a. Member Evaluation Area
 - b. Appropriate area of document catalog
 - c. Team Area
 - d. Solution Suites area (if appropriate),
 Posting will include a link to the 'Request Tracker' to allow review comments be captured on-line and managed within the central repository.
6. Once posted, notification is sent to the TM Forum membership to inform them that the 'Member Evaluation' period is open, (i.e. The DRM completes the Expert Review and Member Evaluation notification email, (template available) and ensures it is included in the next email distribution by Marketing).

Owner

Name	Description	Type
 Program Management	Person who manages and maintains the Collaboration Program roadmap.	Role

12.6 Review and evaluation

The Review and Evaluation phase lasts for approximately 30 working days, (approx 6 weeks) for all materials. More complex documents will be afforded extra time.

During this time, the expert reviewers are expected to review and return all comments (via the link provided, i.e.


http://www.tmforum.org/Community/groups/collaboration_program_center/changerequest.aspx), which will in turn be used by the approval authority (Technical Committee), in making a decision. The **Change Control Group** have the extra responsibility of confirming that all implemented change requests are addressed appropriately and have not introduced unforeseen conflicts etc.

Review comments are captured on-line via the hyperlink which is available in the notification email and again on the artefact web page,

(http://www.tmforum.org/Community/groups/collaboration_program_center/changerequest.aspx).

At the end of the review period, all comments are collated and a proposed recommendation entered into the system by the Program Manager and distributed to the Technical Committee, Project Team and the CCG.

Owner

Name	Description	Type
 Program Management	Person who manages and maintains the Collaboration Program roadmap.	Role

12.7 Technical Committee Approval

The Technical Committee are provided with the approval submissions at the start of this sub-process, in parallel with the Expert Reviewers & Member Evaluation. They are asked to review all deliverables to ensure they are aligned with the current TM Forum Technical Strategy and take into account comments received through the Expert Review and Member Evaluation period to determine whether or not they feel it is at a level of quality fit to remain available from the Document Library of the TM Forum web (www.tmforum.org) & downloads area of the communities and (as appropriate) continue onto Formal TM Forum Approval through Corporate vote.

Reminder reports will be provided to the Technical Committee as appropriate.

The voting will be conducted on-line using the Communities discussion functionality with a separate discussion being created for each deliverable up for review. Generally, the voting period will be the final two weeks of the month, to enable any comments/concerns be addressed at the next TC meeting which is first week of the month.

The vote request will contain the following information:

Closing Date for receipt of votes/comments is: <Date>.

Deliverable up for Vote:

<Tracker ID and title, with hyperlinks>

One-click deliverable download link

Recommendation:

<Details, provide list of fixed CR's if applicable>

CR Number Description

Online Decision Options:

- Approve
 - Further Discussion Required (at next TC meeting - details)
- *****

If the deliverable cannot be approved via the on-line facility, it is brought up and discussed at the next Technical Committee meeting. The Ultimate Technical Committee vote response can return as:

- Approved
- Approved with comments/actions from Technical Committee
- Rejected – but leave in downloads area & web pages
- Rejected – Remove from downloads area & web pages.
- On-hold – for a specified period of time to allow issues be addressed between TC and Team.

The results recorded into the approval submission entry. All comments & actions are also recorded and returned to the teams.

Note: In the interest of speed, a special meeting of the Technical Committee can be called mid-month to address any outstanding vote requests.


Owner

Name	Description	Type
 Technical Committee	Sub-committee of the board that provides the detailed technical strategy and guidance for technical projects	Group

12.8 Approval Result

decision determines the direction/flow of the process.

Incoming Links

Name	Description	Link Label
 Technical Committee Approval	Internal approval for TM Forum formal deliverables	Tech Comm Vote result

Outgoing Links

Name	Description	Decision
 Archive rejected Artifact		Rejected
 Advance Approval Process		

12.9 Archive rejected Artifact


If the artefact is rejected, then

- 1) The Program Manager ensures that the Project team has been notified of the decision via staff support and that the DRM is prompted, who will then archive the material from the web and downloads area, removing it from the system.
- 2) The DRM will close off the tracker entry in approval submission, and ensure that the Change Requests which were identified as implemented within this material are reset to New to re-enter the Review Request process.

If appropriate the team have the ability to return to the Development phase and revise.

In special cases the Technical Committee will instruct that the approval request not continue onto Formal TM Forum Approval, however should remain on the system at a Member Evaluated status and a maturity level of 1. In this case the DRM will ensure that the web posting status and maturity level is set correctly.

Owner

Name	Description	Type
 Document Release Manager	Person in charge of the final processing & posting of the charters or other deliverables.	Role

12.10 Advance Approval Process

Once the Technical Committee vote has finished, the CP Program Manager updates the approval entry to reflect the outcome and re-assigns to the DRM. The DRM checks to see if any updates are required to the material resulting from received comments or approval actions. These updates can be done by either the project team or the DRM as appropriate. If work is being conducted by the team, then updated versions are placed into the 'Submitted for Approval' folder and the DRM notified by Project Team Leader or the Staff support.

DRM finishes quality checks, generates PDF, creates and baselines the material in appropriate 'Approvals Document folder and release in the File Release tab. The associations need to be checked to ensure they are pointing to the corrected documents.


The web page posting is also updated to pick up the revised versions and new status, (TC Approved) and maturity level (Maturity 3). It is also removed from the Member Evaluation area of the web.

DRM ensures that all identified CR's are closed in the appropriate tracker and their status is set to the correct maturity level, (maturity level 3).

DRM verifies if the material is to go for 'Public review/availability' and processes as outlined in that task. (It is rare that material will be made publicly available).

Finally, confirm if material is NOT to proceed for Formal TM Forum Corporate vote

Owner

Name	Description	Type
 Document Release Manager	Person in charge of the final processing & posting of the charters or other deliverables.	Role

12.11 Make Public Available

Incoming Links

Name	Description	Link Label
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 [Advance Approval Process](#) Public Posting

Outgoing Links

Name	Description	Decision
 Advance Approval Process		No
 Process & Post for Public		Yes

12.12 Process & Post for Public


Only after member evaluation and at the decision of the VP for Collaboration Program, will it become available to the public. He/she will also determine if will be made available for sale or for free. If for purchase, then the sale price will also be provided.

DRM sets the appropriate access key in the Content Manager, which will be reflected in the web posting. In addition the DRM will inform web services of the need to make the material available to the public and provide them with the assigned pricing information.

DRM will notify Marketing once the material is available to that they can start their advertisement campaign.

The Public reviewers are welcome to return comments via a hyperlink available from the web page posting, which will automatically route back into the central repository, (i.e. Request submission tracker), which will be automatically tagged to identify them as from non TM Forum Members .

Owner

Name	Description	Type
 Document Release Manager	Person in charge of the final processing & posting of the charters or other deliverables.	Role

12.13 Corporate Vote required

Formal TM Forum Approval means that the material will be presented to the Principal Contact of all Corporate Member companies who will be invited to vote to accept or reject the material as TM Forum Approved. This is the default process flow.

It should be noted that all TM Forum Members (via Principle contact), will be reminded of their obligation to identify any IPR they may have against the material.

Exceptions where TM Forum Approval will not be requested include:



- a. The material type does not require approval, e.g. case studies, white papers, Catalyst reports, etc.
- b. The Technical Committee has deemed that the material is not at an appropriate standard to be considered for formal approval.

In these cases the material will remain posted on the system with a status of 'Member Evaluated' and a maturity level of 3.

Incoming Links

Name	Description	Link Label
 Advance Approval Process		Corporate vote Settings

Outgoing Links


Name	Description	Decision
 End Deliverable Approval Sub-Process		No
 TM Forum Corporate Vote Sub-Process		Yes

12.14 TM Forum Corporate Vote Sub-Process

Detailed here is the steps which are undertaken to set-up and conduct a formal TM Forum Corporate member vote against those deliverables which have received Technical Committee approval. Deliverables which achieve a successful Member vote outcome will be given a status of 'TM Forum Approval' and upgraded to a Maturity level of 4.

Refer to the TM Forum Corporate Vote Sub-Process for details.

Owner

Name	Description	Type
 Program Management	Person who manages and maintains the Collaboration Program roadmap.	Role


12.15 Corporate Vote received

If the Corporate Membership return a 'No' vote, then the artefact will remain unchanged on the TM Forum web and baseline system with a status of Member Evaluated and a maturity level of 3.

Incoming Links

Name	Description	Link Label
 TM Forum Corporate Vote Sub-Process		Corporate Vote result

Outgoing Links

Name	Description	Decision
 End Deliverable Approval Sub-Process		No
 Final Approval Processing		Yes

12.16 Final Approval Processing


Once the vote has completed, and if the Corporate Membership have returned a yes or approved vote, the CP Program Manager routes it to the DRM for final processing.

The DRM will update the status on both the Approvals Submission & associated individual Change Requests, to reflect its 'TM Forum Approved' status and Maturity level of 4.

The artefact notice statement will be updated within the material to reflect its new status and up-versioned in the document repository baseline within the 'Approved Documents' folder. Once again, the entries in the File Release area will be upgraded – to ensure the correct versions will be posted in the downloads area, and the associations to the Approval tracker entry verified. Finally, the Document status, maturity and postings will be updated on the TM Forum web page

Collaboration Program Marketing will be informed of the end result so that they can continue their marketing campaign.

Owner

Name	Description	Type
 Document Release Manager	Person in charge of the final processing & posting of the charters or other deliverables.	Role

12.17 TM Forum Membership

Members of the TM Forum

12.18 Technical Committee

The chief duties of this committee are to develop the strategic plan in collaboration with the members. It also provides advice and guidance to the board, participates in the review and approval of project charters and deliverables as well as input to the Strategic Operating Plan

12.19 Expert Reviewer(s)

This role is generally held by the Team Leaders Group, Change Control Group, Service Provider Leadership Council and the various Sector heads.

12.20 Non TMF Members (Public)

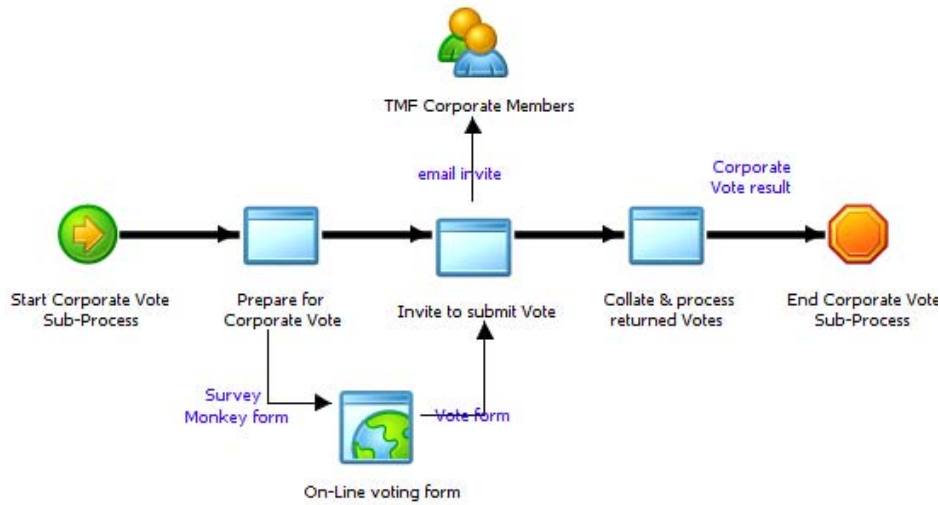
Denotes requests from other organisation or suggestions from outside the TM Forum Membership

12.21 End Deliverable Approval Sub-Process

13.0 TM Forum Corporate Vote Sub-Process

Process Narrative

TM Forum Corporate Vote Sub-Process



Detailed here is the steps which are undertaken to set-up and conduct a formal TM Forum Corporate member vote against those deliverables which have received Technical Committee approval. Deliverables which achieve a successful Member vote outcome will be given a status of 'TM Forum Approval' and upgraded to a Maturity level of 4.

Refer to the TM Forum Corporate Vote Sub-Process for details.

Owner

Name	Description	Type
Program Management	Person who manages and maintains the Collaboration Program roadmap.	Role

13.1 Start Corporate Vote Sub-Process

13.2 Prepare for Corporate Vote

A week before the vote is scheduled to commence, the CP Program Manager or DRM will prepare the vote information by completing the set template and email to web services & Marketing. In addition, ensure the correct versions of the deliverables are posted and all review comment links etc. are set correctly.

The data that must be provided include:

- a. Vote start date:
 - b. Vote end date:
 - c. Reminder email date: (if required)
 - d. Completed templates, which will be used to be distributed, but require hyperlink for the survey page, which IT will provide. Note: there are 3 templates in one document.
- Using provided information Web services and Marketing will
- a. web services create survey monkey entry – following an agreed template.
 - b. Marketing can generate voting emails and schedule or use those provided as appropriate.
 - c. Web services generate reminder emails and schedule

Owner

Name	Description	Type
Program Management	Person who manages and maintains the Collaboration Program roadmap.	Role


13.3 On-Line voting form

13.4 Invite to submit Vote

Using the Promotional email Manager, CP Marketing ensures that the invite email is distributed to the Principal Contact of all Corporate Member companies who will be invited to vote to accept or reject the material as TM Forum Approved. It should be noted that all TM Forum Members (via Principal contact), will be reminded of their

obligation to inform the TM Forum of any IPR issues they may have against the material. Links to the online voting form and deliverables will be included in the email invite and the vote end date highlighted.

Owner

Name	Description	Type
 Program Management	Person who manages and maintains the Collaboration Program roadmap.	Role

13.5 Collate & process returned Votes


CP Program Manager and/or DRM will keep account of the voting results and ensure that the quorum has been achieved within the voting timescale.

If it looks like the minimum number of votes will not be returned an appropriate course of action will be taken to highlight to the Membership.

The system will automatically calculate the voting status, and close the vote on the designated date.

The final vote results, (percentage values) are stored on the system by the CP Program Manager and made available to the Membership via the communities.

Owner

Name	Description	Type
 Program Management	Person who manages and maintains the Collaboration Program roadmap.	Role

13.6 TMF Corporate Members

This depicts the Principal Contact for each Corporate Member of the TM Forum.

13.7 End Corporate Vote Sub-Process