

Fujitsu	POA Customer Service Policy Manual	Ref:	CS/QMS/001
		Version:	2.0
	Company In Confidence	Date:	14/09/05

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**Document Title:** Fujitsu POA Customer Service Policy Manual

**Document Type:** Quality Management System

**Release:** Non-specific

**Abstract:** This document forms part of the Fujitsu POA Customer Service Quality Management System. It provides policy guidelines to support the definition of the CS business processes.

**Document Status:** Approved

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## 0 Document Control

### 0.1 Document History

Version No.	Date	Reason for Issue	Associated CP/PinICL No.
0.1	15.1.01	First draft	
1.0	26.1.01	For approval.	
1.1	16.08.05	Updated with changes to organisation. Also references to process methodology removed.	PPRR_0518
2.0	14/09/05	For approval	PPRR_0518

### 0.2 Approval Authorities

Name	Position	Signature	Date
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### 0.3 Associated Documents

Reference	Version	Date	Title	Source
			Process Blueprint.	Web page CS Intranet.

### 0.4 Abbreviations/Definitions

Abbreviation	Definition
BCMT	Business Continuity Management Team
CS	Fujitsu POA Customer Service
HSRF	Horizon Service Review Forum
HSD	Horizon System Helpdesk

Fujitsu

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MBCI	Major Business Continuity Incident
NBSC	Networked Business Support Centre
PIR	Post Implementation Review
POA	Post Office Account
POL	Post Office Ltd
TP	Temporary Procedure

### *0.5 Changes in this Version*

Version	Changes
0.1	First draft.
1.0	Minor revisions in sections 3.4, 4.1.1, 6.2, 7.4, 8.8, 9.2, 9.3, 9.4, 10.2.2, 12.0, 14.0. Sections 4.1.2 and 4.1.3 deleted.
1.1	Global edits in view of organisation changes. Deletion of sections relating to Process methodology. Minor amendments to bring document in line with expected move to BS15000.

### *0.6 Changes Expected*

Changes
Comments arising from peer review.

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## 1 Introduction

This document forms part of the Fujitsu POA CS Quality Management System. It provides policy guidelines to support the definition of the CS business processes.

The CS business is considered to be divided into a number of key process areas, see Process Blueprint [ref. 1] for detail. The information contained within this document defines the policy guidelines that relate to the operation of the CS business processes and the CS external interfaces.

## 2 Scope

The scope of this document mirrors that defined in the CS Process Manual, see [ref. 1] for detail.

## 3 CS Process Policy

The CS process policy distinguishes between policy guidelines, business process definitions and operational procedures.

### 3.1 CS policy guidelines

#### Policy

- a) CS will record and maintain the policy guidelines that are required to support the development and maintenance of CS business process definitions in a CS Policy Manual.
- b) The CS Policy Manual will be recorded on PVCS.

### 3.2 CS business process definitions

CS business process definitions have the following characteristics:

- a) they are owned and authorised by nominated members of the CS Management Team;
- b) they show the inputs to and the outputs from the CS business;
- c) they show how the process inputs, e.g. incidents, problems, complaints, etc. flow through the CS business and describe the major activities performed;
- d) they provide a maintained framework to support the evolution and optimisation of the CS organisational structure, roles, responsibilities and business effectiveness.

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- e) they provide a maintained framework for the development of operational procedures.
  - f) they define the current (as is) situation or a planned future position.

**Policy**

- a) CS will develop and maintain a CS Process Blueprint. The CS Process Blueprint will contain high-level definitions of the key CS business processes. The CS Process Manual will be recorded on PVCS but is primarily accessed via a Web page on the CS Intranet.
- b) Where there is a business case for holding additional process information, CS will develop and maintain additional cross-referred lower-level business process definitions. These will also be recorded on PVCS.



### 3.3 *CS operational procedures*

CS operational procedures have the following characteristics:

- a) they relate to a particular CS organisational unit;
- b) they are owned and authorised by the CS line manager responsible for a particular CS operational unit;
- c) they describe how activities are currently carried out within a particular CS operational unit;
- d) they include exception handling and escalation procedures.

In the context of this document operational procedures also includes CS work instructions.

#### **Policy**

- a) CS line managers will develop, implement and maintain operational procedures and / or work instructions for all business activities that are carried out within the business area they are responsible for.
- b) CS operational procedures and / or work instructions will be recorded on PVCS. Alternatively, they may be recorded on a CS Intranet site. However, if this option is chosen, CS line managers must put in place local procedures to ensure that:
  - current versions of operational procedures and / or work instructions are published on the CS Intranet site;
  - their staff know how to access current versions of operational procedures and / or work instructions;
  - security is in place to safeguard the procedural information published on the CS Intranet site;
  - a capability exists to quickly access (within 1 hour) the procedural information from an alternative source, if the electronic data on the Intranet site is lost.



## 4 *Retention of process records*

### Policy

Selected records of the data that pass through CS processes will be retained for a defined period. The retention periods is defined as “end of contract plus six years”.

The following records will conform to the above.

Pathway CS and CORE SERVICES Incident Management records

PowerHelp records

Live Incident Management PEAK records

BIMS records

Pathway CS Problem Management records

Live Problem Management PEAK records

Pathway CS Software Release Management records

Software release notes

Pathway CS Operational Business Change records

OBC forms

CORE SERVICES Change Control records

OCP forms

## 5 *General topics that relate to more than one service management discipline*

### 5.1 *Operational Interface Agreements and Operational Level Agreements*

#### Policy

- a) Fujitsu POA CS will work with relevant POL authorities to develop and implement Interface Agreements (IFAs) and / or Operational Level Agreements (OLAs) for each service management interface that exists between Fujitsu POA CS and POL.
- b) The IFAs and OLAs will specify the actions that are taken when errors occur, including a clear definition of when and how incidents are raised.
- c) IFAs and OLAs will be produced and published by either Fujitsu POA CS or POL. Both organisations will authorise their use in the live environment.
- d) Authorisation of an IFA or OLA will signify an obligation to ensure that local operational procedures conform to the content of the IFA or OLA.

### 5.2 *Escalation*

#### Policy

- a) Exceptional situations that occur in any of the CS service management disciplines (incident management, problem management, service review, etc.), which have a significant effect on the Fujitsu POA or POL business, will be escalated within the relevant Fujitsu POA CS management structures.
- b) Further escalation to Fujitsu Red alert will be at the discretion of the CS Management Team.
- c) Escalation will normally occur:
  - when there is a time delay which causes consequential business impact, or
  - when it has not been possible to reach agreement on the definition or management of an issue.

## 6 *Operate and monitor the live environment*

### 6.1 *Operate Fujitsu POA central systems (including in-built software routines and automated processes)*

Operation of the Fujitsu POA central systems has two components:

- a) the automated elements that are controlled by in-built software routines;
- b) manual activities that are subcontracted to Core Services.

#### **Policy**

- a) Changes to software that is involved in the operation of the Fujitsu POA central systems will be managed via the Fujitsu POA Change Control Process which is owned by the Fujitsu POA Programme Office. CS Operations and / or Support Services will impact any proposed software changes.
- b) Significant changes to manual procedures, e.g. those that affect the running of an interface, will be managed by the Operational Change Process which is owned by Customer Services Change Manager.
- c) Core Services will develop and maintain operational procedures for all manual activities that are associated with the operation of the Fujitsu POA central systems.
- d) CS will have the opportunity, subject to giving prior warning, to audit the Core Services operational procedures.
- e) CS Operations Services will review the Core Services provided service at agreed intervals.

### 6.2 *Monitor Fujitsu POA central systems*

The monitoring of the Fujitsu POA central systems:

- a) is achieved via the use of service management tools, e.g. Tivoli;
- b) is subcontracted to Core Services.

#### **Policy**

- a) Core Services will develop and maintain operational procedures for all manual activities that are associated with the monitoring of the Fujitsu POA central systems.
- b) Core Services will maintain a clear set of criteria for determining which "system events" are progressed to incidents.
- c) Changes to (a) or (b) above will be managed by the Operational Change

Process which is owned by Customer Services Change Management.

- d) CS will have the opportunity, subject to giving prior warning, to audit the Core Services criteria for raising incidents and the Core Services operational procedures.
- e) CS Operations Services will review the Core Services provided service at agreed intervals.

### 6.3 Record changes to Fujitsu POA central systems

This section applies to non-software changes. Software changes are controlled via the Fujitsu POA Change Control Process, which is owned by the Fujitsu POA Programme Office.

Non-software changes may be required for sizing reasons, e.g. a larger capacity disk. Alternatively, changes may result from industry changes, e.g. certain hardware components being replaced by new versions.

#### Policy

- a) Non-software changes to the Fujitsu POA central systems will be managed by the Operational Change Process which is owned by CS Change Manager.
- b) The OCP forms will be used to provide a historical record of the non-software changes that have been applied to the Fujitsu POA central systems.
- c) The retention period for OCP forms is defined in section 5.

### 6.4 Manage software distribution

Wherever possible, software is distributed electronically via the Fujitsu POA central systems.

Software distribution is controlled by a Release Note provided by CS Release Management authorities.

The software distribution process is subcontracted to Core Services.

#### Policy

- a) Core Services will develop and maintain operational procedures for all manual activities that are associated with the distribution of software.
- b) CS will have the opportunity, subject to giving prior warning, to audit the Core Services operational procedures.
- c) CS Operations Services will review the Core Services provided service at agreed intervals.

## 7 Incident Management

Incident Management provides a controlled environment for the resolution of day to day events that interrupt normal operation of the systems, services and procedures within the live operational environment. Incident Management also provides:

- a) triggers for problem management;
- b) triggers for the application of business continuity plans;
- c) onward routing of unresolved complaints;
- d) service data for reports.

A large part of incident management is subcontracted to Core Services. The exceptions are third line software support, which is handled by the Fujitsu POA CS System Support Centre (SSC) and the handling of business incidents, which is managed by the Fujitsu POA CS Management Support Unit (MSU).

### Incident

An incident is an individual day to day event, within the live environment, which is reported to the Fujitsu POA single-point-of-contact, i.e. the HSD. Incidents may also be reported to the POL single-point-of-contact, i.e. the NBSC. Incidents may be transferred between the HSD and the NBSC.

Where there is any chance of confusion, incidents are more tightly defined as “live incidents”.

To avoid confusion, “incidents” that occur in the pre-live environment are always referred to as “pre-live incidents”.

The main incident types include:

- a) requests for advice and guidance;
- b) reported faults or failures in equipment, software, services or procedures;
- c) reported user errors;
- d) reported complaints;
- e) situations which need to be recorded for audit trail purposes.

### Temporary procedure (TP)

A TP describes the actions to be taken when specified types of incident are encountered. TPs are developed by the appropriate expert domain within Incident Management and are recorded on a Known Error Log.

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## 7.1 *Hours of operation (call answering)*

### Policy

24 hours, each day of the year excluding Christmas Day.

## 7.2 *Incident logging and prevention of callers being "bounced" from desk to desk*

### Policy

- a) All valid telephone calls made to the Fujitsu POA HSD will result in an incident being raised and a priority being allocated.
- b) Incidents will be assigned an unique reference number.
- c) The HSD will maintain a call matrix that clearly defines the types of incidents that they accept and manage to resolution.
- d) The HSD will maintain an awareness of the types of Horizon related incidents that are handled by the NBSC.
- e) If callers contact the HSD when they should have contacted the NBSC, the HSD will normally refer the caller to the NBSC, i.e. ask them to dial the NBSC number. By exception, if the caller states that they have already been referred to the HSD by the NBSC, the HSD will accept the call, raise an incident and communicate the incident to the NBSC.

## 7.3 *Linking incidents passed between desks*

### Policy

- a) If the HSD wishes to transfer an incident to the NBSC, the HSD will retain ownership of the incident until the NBSC accepts the incident.
- b) If the NBSC accepts the incident, the HSD will cross-refer their incident to the NBSC incident and then close the HSD incident.
- c) If the NBSC does not accept the incident, the HSD will retain ownership of the incident and escalate the situation within the their line management for resolution.



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## 7.4 Incident resolution

### Policy

- a) Following the logging of an incident the HSD will assume responsibility for the control and co-ordination of the efforts required to resolve the incident.
- b) Incident resolution will be progressed in accordance with agreed target resolution times.
- c) The HSD will either resolve the incident themselves or route the incident to the appropriate expert domain. The incident record will be updated each time there is a change of status, e.g. network tested and found to be OK, incident routed to third line support.
- d) Resolution will follow defined support procedures, which will normally result in the system being returned to normal operation within the agreed target resolution time. By exception workarounds may be applied while a fix is developed.

## 7.5 Development of Work arounds

### Policy

In exceptional situations expert domains may develop workarounds to contain incidents while a fix is developed. Workarounds will be recorded on a Known Error Log. POL are asked to impact any workarounds which have an impact on POL internal business processes.

## 7.6 Incident closure

### Policy

- a) Individual incidents that relate to technical or system errors will be closed when the service has been returned to normal operation, either by resolving the incident or applying a workaround. Closure will be agreed with the originator of the incident.
- b) Incidents that are “offered” to the POL NBSC will be closed when the NBSC accepts responsibility for incident resolution.
- c) “Master incidents” that record the need for a fix will remain open until notification of successful release of the fix has been received.
- d) “Master incidents” that relate to a problem will remain open until the problem is resolved.



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## 7.7 *Provision of information for service and performance reporting*

### Policy

The HSD will maintain records to facilitate performance reporting and incident trend analysis.

## 7.8 *Communicating problems and major business continuity incidents*

### Policy

- a) The HSD will communicate problems to the Fujitsu POA CS Duty Manager. The definition of a problem is given within the section entitled Problem Management.
- b) The HSD will communicate Major Business Continuity Incidents to the Fujitsu POA CS Duty Manager. The definition of a Major Business Continuity Incident is given within the section entitled Business Continuity Management.

## 7.9 *Onward routing of business incidents*

### Policy

Business incidents identified by Incident Management will be routed to the Fujitsu POA MSU. The MSU will maintain procedures for communicating, reporting and resolving business incidents and any financial implications.

## 7.10 *Onward routing of unresolved complaints*

### Policy

- a) Wherever possible, complaints reported to the HSD will be resolved by the HSD.
- b) Complaints that cannot be resolved by the HSD will be routed to the Strategic Services Unit (SSU) within Fujitsu POA CS for resolution.
- c) CS POA aims over time to move more functions from skilled operation to less skilled operation, thereby freeing skilled staff to drive down overall levels of complaints.

## 8 Problem Management

Problem Management provides a controlled environment for the resolution of problems that arise within the live operational environment.

### Problem

Problem is the term used for an adverse situation that is:

- (a) caused by a defect in the specification, design, production, implementation or use of any of the service components
- (b) substantial enough to warrant action to eradicate it. A problem may be indicated by a trend of incidents. Problems are deemed to exist when they are recorded on the Fujitsu POA CS or POL Problem Management Databases.

### 8.1 Hours of operation (progressing problem resolution)

#### Policy

9.00am to 5.00pm Monday to Friday.

### 8.2 Logging problems

#### Policy

- a) Fujitsu POA CS will develop and maintain procedures to control the receipt of problem notifications from HSD, from within Fujitsu POA CS and in the case of cross-domain problems (problems that involve both Fujitsu POA CS and POL organisations), problem notifications from POL Problem Managers.
- b) Problem notifications will result in a problem being raised, the assignment of a unique reference number and the logging of the problem on the Fujitsu POA CS Problem Management database.
- c) Cross-domain problems, i.e. problems that require the involvement of both Fujitsu POA CS and POL, will be logged on both the Fujitsu POA CS and POL Problem Management databases. The Fujitsu POA CS and POL problem references will be cross-referred.
- d) All problems reported by POL will be recorded on the Fujitsu POA CS Problem Management database, irrespective of any initial judgement relating to Fujitsu POA's required involvement.

### 8.3 Allocation of a Problem Manager

**Policy**

Problems are classified as being associated with a particular service. The Service Delivery Manager for that service will always be the Problem Manager for any problem associated with their service. Problems which have impact across all services will be the responsibility of the Service Delivery Team Manager.

### 8.4 Problem resolution

**Policy**

Fujitsu POA CS Problem Managers will:

- a) manage problem resolution;
- b) ensure that the problem record on the Problem Management database is maintained to reflect the current position;
- c) manage the allocation of resource on an as required basis, to progress specific problem resolution activities, e.g. change to a procedure, software fix;
- d) escalate within Fujitsu POA CS on an as required basis.

### 8.5 Problem closure

**Policy**

Problems will be closed when it has been agreed, by the relevant authorities, that the underlying cause has been fixed or removed.

## 9 Business Continuity Management

Business continuity has two main components. The first is business continuity planning, which involves the proactive identification of things that can go wrong with the end-to-end services, developing appropriate business continuity plans and testing that the plans work in practice.

The second component involves the application of the business continuity plans when the end-to-end service is interrupted.

#### Business Continuity Plans

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Business continuity plans detail the actions to be taken when the end-to-end service is interrupted.

#### Major Business Continuity Incident (MBCI)

MBCIs are a special type of incident, which are raised in response to the reporting to the HSD of a major failure or disruption in the end-to-end service. MBCIs are routed to the Fujitsu POA CS Business Continuity Manager and act as a trigger for the application of pre-defined business continuity plans.

### *9.1 Hours of operation (application of business continuity plans)*

#### **Policy**

Fujitsu POA CS Business Continuity Management: 24 hours, each day of the year excluding Christmas Day.

### *9.2 Business continuity planning*

#### **Policy**

Fujitsu POA CS and POL business continuity authorities will:

- a) jointly develop test scripts;
- b) agree a schedule for testing the contingency and recovery arrangements for defined components of the Horizon service;
- c) maintain a joint Business Continuity Forum for reviewing all business continuity arrangements on at least a quarterly basis;
- d) work together to assess the risks and impacts of new systems / services or changes to current systems / services, the results of which will be used to identify the level of contingency required.
- e) develop business continuity plans to meet the contingency requirements.

## *10 Service and Performance Reporting*

Service and performance reporting identifies the level of performance of systems and services in the live operational environment. Until the roll-out programme is completed it also includes implementation reporting.

Reports are provided to service reviews to:

- a) show how services are performing against agreed SLAs;
- b) provide information for service improvement;

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c) aid in decision making;

d) highlight problems.

Reports may:

a) be periodic to support regular meetings;

b) be ad hoc;

c) provide analysis or forecasting information.

#### Service and Performance Reports

Service and performance reports contain information about a particular service, derived from a reliable source, which is meaningful to the reader and aids decision making.

#### **Policy**

- a) Service and performance reports will be objective and relevant to the interests of the target audience, with data and information contained within the report specific to the requirements of the target audience.
- b) Reports will be timely, reliable, clear, concise and meaningful to the reader.
- c) Reports will have instructions that explain the format and content.
- d) Reports will be in a format that the target audience understands and are able to use effectively to allow informed decisions to be made.
- e) The content of reports will include a core set of information, plus ad hoc detail when appropriate, e.g. an explanation of a fluctuation in the reported information.
- f) Agreements will be formulated with all suppliers of data to ensure that a clear and consistent information set is always available for analysis purposes.
- g) Periodic reports will be produced and distributed to agreed timescales, e.g. monthly, weekly.
- h) Ad hoc reports will be produced, on request, in accordance with pre-defined reporting arrangements.
- i) Reports will evolve to:
  - reflect the changing state of the business;
  - incorporate audience feedback on the style, layout, format and level of detail.

## **11 Service Review**

Service reviews bring together relevant people to assess how the service is performing and initiate any required actions to correct shortfalls or take advantage of improvement opportunities.

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### Service Review

Service reviews examine information relating to the performance of services in order to identify:

- a) services that are not conforming to agreed SLAs;
- b) any services that are deteriorating;
- c) SLAs that are no longer realistic;
- d) existing SLAs that are no longer required;
- e) situations where additional OLAs are required.

When applicable, service reviews also identify, record and communicate to relevant authorities:

- a) service improvement opportunities;
- b) problems.

### Service Review Forum

Service review forums are formal pre-defined meetings held periodically to an agreed timetable.

There will be a number of forums:

- a) internal forums held as necessary within Fujitsu POA CS and POL;
- b) Fujitsu POA CS and POL cross-domain forums, with each addressing a specified service element;
- c) contractually defined forums, e.g. Horizon Service Review Forum (HSRF).

The HSRF reports to the Contract Administration Board and the Contract Steering Group. Information on these forums is defined in Schedule Ao4 of the contract.

### **Policy**

- a) Service review forums will be well structured and chaired by a nominated manager from either Fujitsu POA or POL.
- b) The chairman will ensure that:
  - minutes are produced and circulated to interested parties;
  - issues that cannot be resolved by the service review forum will be escalated to the HSRF.
- c) Problems will be discussed at service review forums, noted in the minutes and progressed with via Problem Management.
- d) Service improvements opportunities will be discussed at service review



forums, noted in minutes and progressed as service improvement initiatives.

## 12 Change Management

There are two main types of change, i.e. ad hoc change and predefined change.

Ad hoc change uses POL raised Change Requests (CRs), Fujitsu POA raised Change Proposals (CPs) and Fujitsu POA raised Contract Change Notices (CCNs). The ad hoc change process is well established and managed within Fujitsu POA by the Programme Office.

Pre-defined change uses agreed change mechanisms, i.e. Operational Business Change, to make changes without the requirement for POL to raise a CR. There are two types of OBC, i.e. product change and outlet changes.

## 13 Software Release Management

### Policy

- a) Planned software releases will be communicated to POL via a weekly release schedule and daily release notifications.
- b) Software release to the live environment will be controlled by Fujitsu POA CS authorised Release Notes.