

ITIL V3 Study Guide

This guide is created to assist ITIL V3 Foundation candidates to study for the certification examination. The guide is not all encompassing of what you should know but it is a snapshot of the basic terms, concepts, lifecycle stages and processes. This guide should not be a substitute for studying the course materials in depth and attending a classroom or online course. BlueprintAudits.com does not make any claim that studying only this material will result in achieving certification. However, used in combination with self study, classroom instruction and supplemental approved course materials, you can prepare yourself for the exam thoroughly! Good luck.

Key Terms

Service – A means of delivering value to customers by facilitating Outcomes Customers want to achieve without the ownership of specific Costs and Risks.

Service Management – A set of specialized organizational capabilities for providing value to customers in the form of services.

ITIL – (Information Technology Infrastructure Library) a set of best practice guidance for IT Service Management. Proven good practice that is wide industry use. First published in 1980s by the OGC (Office of Government Commerce).

Function – A team or group of people and the tools they use to carry out one or more processes or activities. A unit of the organization.

Role – A set of responsibilities, activities and authorities granted to a person or team.

Process – A structured set of Activities designed to accomplish a specific objective. A process should create value for the stakeholders.

Improvement – outcomes when compared to before show measurable increase of a desirable metric or decrease of undesirable metric.

Benefit – the gains achieved as a result of an improvement

Baseline – a benchmark used as a reference point, which is measured and approved.

Snapshot – The current state of a configuration as captured by a discovery tool.

Capability – The intangible assets of an organization including people, process, knowledge, processes, etc.

Resources – A tangible asset of an organization including IT infrastructure, money, people or other asset used to deliver a service.

Product Manager – Owns and manages a set of related services, evaluates market opportunities and customers needs, creates business cases and plans for new service deployment programs.

Business Relationship Manager – Identifies and documents customer needs. Documents patterns of business activity and user profiles. Identifies correct service level packages for their customers.

Core Service – An IT Service that delivers outcomes desired by one or more customers.

Supporting Service – A service that enables or enhances a core service.

ROI – Return on Investment by measuring the benefit or savings associated with an expenditure over time.

VOI – Value of Investment in benefits that are non-monetary or long-term outcomes.

Service Provider – An organization supplying Services to one or more Internal Customers or External Customers. There are three types: Internal, External, Shared.

Process Owner – Assist with the design, documentation, and performance enhancement of a process by monitoring and improving over time making sure the desired outcome is achieved.

Service Owner – Responsible to the Customer for the initiation, transition and ongoing maintenance and support of a service over its lifecycle.

Supplier – Third party responsible for supplying goods or services to one or more customers.

Business Case – a decision support and planning tool that predicts outcomes of a proposed action.

Contract – A legally binding document between one or more parties to supply goods or services.

Utility – fit for purpose

Warranty – fit for use, a defined level of service availability, capacity, continuity and security.

CSI Manager – Ultimately responsible for the success of all improvement activities. Responsible for the deployment of CSI, communicating the vision and ensuring the success of all improvement activities working with process owners, SLM and SO.

Event – an alert or notification created by a service or CI typically significant requiring action. Three types of events: exception, warning and information.

Alert – Something that happens that triggers an event or a call for action.

Incident – An unplanned interruption or reduction in the quality of an IT Service or could be in the future.

Timescales – timeframes for each stage of the incident based upon SLA and priority.

Model – A standard, pre-defined method or template. Used for Incidents, Problems, Requests, Changes, Releases, Deployments & Services

Categorization – Category type structure for storing incidents in a database.

Problem – The unknown cause of one or more incidents.

Known Error – The known root cause of a problem that has a workaround.

Workaround – a temporary fix to an incident or problem, or method that makes the customer not reliant on a failed portion of the infrastructure.

Service Request – A request from a user for information, advice or for a standard change.

Access – the level and extent of a service's functionality or data that a user is entitled to.

Identity – information about a user that distinguishes them as an individual.

Rights – privileges provided with access including read, write, execute, change, delete.

Service Measurement – ability to predict and report service performance against targets.

Service Manager – manages the development, implementation, evaluation and on-going management of new and existing products and services.

Service Package – detailed description of a service and includes SLP, one or more core and supporting services.

Service Level Package – Defined level of utility and warranty for a particular service package.

Functions

Service Desk

Technical Management

Application Management

IT Operations Management (includes operations control and facilities management)

3-Processes In Detail

Know Objective, Activities, Inputs, Outputs, KPIs, Challenges and Roles

Incident Management

Change Management

Service Level Management

Key Concepts

Good practice VS Best practice – A good practice is standards and frameworks that are established and in wide industry use and it includes proprietary knowledge.

Priority=Impact + Urgency

Three types of service providers: internal, external and shared.

Delivery models – insourcing, outsourcing, co-sourcing, partnership or multisourcing, Business Process Outsourcing (BPO), Application Service Provider (ASP) and Knowledge Process Outsourcing (KPO - the most recent form).

Service Model – a graphical representation of a business opportunity to create value.

Process Model – A process (activities, metrics, roles, procedures, instructions, improvements) that uses inputs to create outputs (outcome and review). The process is controlled (owner, objective, documentation, feedback) and enabled (resources and capabilities) and is initiated by a trigger.

Service Lifecycle – Requirements, defined, analyzed, approved, chartered, designed, developed, built, test, release, operational and retired.

The characteristics of a process are MSCR – **M**easureable, deliver **S**pecific results to **C**ustomers and **R**espond to a specific event.

The five aspects of Service Design are STAMP: **S**ervices, **T**echnologies, **A**rchitectures, **M**etrics and **P**rocesses.

Conflicting Motives (Balances) – Internal vs External, Stability vs Responsiveness, Quality vs Cost, Reactive vs Proactive.

RACI – Responsibility matrix for the activities of a process that defines who is **responsible**, who is **accountable**, who is **consulted** and who is **informed**.

PDCA – The Deming Cycle of Continuous Improvement: **P**lan, **D**o, **C**heck, **A**ct.

Processes in Service Strategy: Demand Management, Financial Management and Service Portfolio Management.

ISSAC IS – The seven process in Service Design: **I**T Service Continuity Management, **S**upplier Management, **S**ervice Catalog Management, **A**vailability Management, **C**apacity Management, **I**nformation Security Management, and **S**ervice Level Management.

Processes in Service Transition (CSR): **C**hange Management, **S**ervice Asset and Configuration Management, and **R**elease and Deployment Management, and .

A PIER – The five processes in Service Operations are **A**ccess Management, **P**roblem Management, **I**ncident Management, **E**vent Management and **R**equest Fulfillment.

CI's – configuration item

VJID – reasons why we measure to **validate**, to **justify**, to **intervene** and to **direct**.

STP – Three types of metrics, **s**ervice metrics, **t**echnology metrics and **p**rocess metrics.

Risk Management and Analysis – Identify, own, evaluate, accept, define solution (Risk Analysis) AND implement response, assure effectiveness and embed and review (Risk Management). (MoR)

CSI Model – What is the vision? (strategy) Where are we now? (assessment) Where do we want to be? (target) How do we get there? (process improvement) Are we there yet? (measure) How do we keep the momentum going?

Two outputs from change management (documents for communication):
PSO – projected service outage and Change Schedule

Three types of changes: Normal/Standard/Emergency

RFC – request for change (the trigger for Change Management)

CAB – Change Advisory Board (change approval for most normal changes, some are done by change manager)

ECAB – Emergency Advisory Board (change approval for emergency changes)

7 R's – What we need to consider when assessing a change: raised, reason, return, risks, resources, responsible, and relationships.

Release Unit – a group of CIs that are usually released together.

Release Package – a group of release units (delta and full) that can be successfully released into the live environment and deployed.

Release and Deployment Methods: big bang vs phased, push vs pull, automated vs manual.

Two methods to understand demand:
Patterns of business activity and user profiles.

Main activities of Service Strategy: define the market, develop the offerings, develop strategic assets and prepare for execution.

4 Ps – to consider in a design of Service Management **people, products, partners and processes**.

Service Design Package – details all aspects of a service through all stages of its lifecycle and is passed from design to transition for implementation (blueprint).

Documents from Service Level Management:

SLA – Service level agreement

OLA – operational level agreement

UC – underpinning contract (with supplier management)

SLR – service level requirements

SIP – Service Improvement Plan

3 SLA structures: Service, Customer & multilevel (includes corporate)

Availability formula – $ASL - \text{downtime} / ASL * 100$

V-Model – Service validation model that builds in service validation and testing early in the service lifecycle.

Areas of focus to improve availability:

Reliability – ability to remain operational without failure

Resilience – ability to remain operational despite failure

Maintainability – ability to maintain in operational condition

Serviceability – ability of service provider to keep service available

MTTR – mean time to repair

MTBF – mean time between failure

MTBSI – mean time between system incidents

Detect, diagnosis, recover and restore

VBF – Vital Business Function

DIKW – Data, information, knowledge, wisdom

CIA+(Non-Repudiation, authentication) – Requirements for the security of information: confidentiality, integrity and availability and authentication.

The three levels of capacity management:

BCM – Business Capacity Management

SCM – Service Capacity Management

CCM – Component Capacity Management

BIA – Business Impact Analysis – understanding the financial cost of service outages.

Recovery options:

manual, reciprocal, gradual, intermediate, fast and immediate.

Technologies

Tool Selection steps: define requirements, analysis of requirements, evaluate vendors, tool selection.

KEDB – Known Error Database – storage of known errors and their workarounds

CMIS – Capacity Management Information System

ISMS – Information Security Management System

SCD – Supplier Contract Database

SKMS – Service Knowledge Management System with four levels, data and information, information integration, knowledge processing and presentation.

CMDB – Configuration Management Database

CMS – Configuration Management System

DML – Definitive Media Library

Service Portfolio – Contains the service pipeline, service catalog and retired services to keep track and document a service throughout the lifecycle.

Service Catalog – Services in the live environment or prepared to be transitioned into the (chartered) live environment it includes the business service catalog and the technical service catalog.

Objective of all 5 Phases

Service Strategy – The objective of Service Strategy is to transform Service Management into a strategic asset by providing guidance on what services to offer and to whom, how to create value for our customers, and how to differentiate ourselves from competing alternatives.

Service Design – The objective of Service Design is to design and develop services and processes for new services, improved services and improvements necessary to maintain value to customers over the lifecycle.

Service Transition – The objective of Service Transition is to plan and implement the deployment of all releases to create a new or improve an existing service, ensuring that the value to the business is achieved. To realize the plans from Service Design and release into operations successfully.

Service Operations – The objective of Service Operations is to coordinate and carry-out day-to-day activities and processes to deliver and manage services at agreed levels, where the plans, designs, and optimizations are realized by the business.

Continual Service Improvement – The objective of CSI is to align IT services to changing business needs by identifying and implementing improvements to processes, services, activities and functions.

Process Objectives

Service Operations

Incident Management – To restore service as quickly as possible within agreed service levels and minimize the impact to the business.

Event Management – detect and make sense of events and determine appropriate controls.

Request Fulfillment – provide a channel for users to request and receive standard services.

Problem Management – to prevent problems and resulting incidents from happening and to eliminate recurring incidents and minimize impact of those that cannot be prevented.

Access Management – granting authorized users the right to use a service and prevent access by non-authorized users.

Service Transition:

Change Management – Respond to the changing business requirements while maximizing value and reducing incidents, disruption and re-work.

Service Asset and Configuration Management – protect the integrity of service assets and configuration items through the service lifecycle.

Release and Deployment Management – to create clear, comprehensive release and deployment plans to build, test and deploy change projects into the environment.

Service Design

Service Catalog Management – Create and manage an accurate service catalog.

Service Level Management – negotiate, agree and document service levels and ensure that all operational services and their performance are measured in a consistent way.

Availability Management – ensure that the levels of service availability are delivered in all services to match or exceed the current and future agreed needs of the business.

Information Security Management – provide a focus for all aspects of IT security and manage all IT security activities. To protect the interests of those relying on information.

Supplier Management – manage supplier relationship and performance.

Capacity Management – ensure a cost justifiable IT capacity always exists in all areas of IT and is matched to current and future agreed levels.

IT Service Continuity – ensure that the required IT technical and service facilities can be resumed within required and agreed timescales in the event of a major disruption.

Service Strategy

Service Portfolio Management – Decide what services to offer, understanding why customers should buy them from us and provide direction to service design.

Demand Management – understand customer requirements for services and how they vary over the business cycle and ensure the provision of the service at the appropriate level.

Financial Management – operational visibility into the financial aspects of IT services to enhance decision making, operational control and ensure value capture and creation.

CSI

7-Step Improvement Process (SC GPA PI) – What **should** you measure, what **can** you measure, **gather** the data, **process** the data, **analyze** the data, **present** the data and **implement** improvement. (students from USC have a GPA of PI)