



ITIL® Basics Quick Reference Card

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Service Strategy Processes

Strategy Management for IT Services, Demand Management, Service Portfolio Management, Financial Management for IT Services, Business Relationship Management

Service Design Processes

Design Coordination, Service Level Management, Service Catalogue Management, Availability Management, Information Security Management, Supplier Management, Capacity Management, and IT Services Continuity Management

Service Transition Processes

Change Management, Service Asset and Configuration Management, Release Deployment Management and Transition Planning and Support

Service Operation Processes and Functions

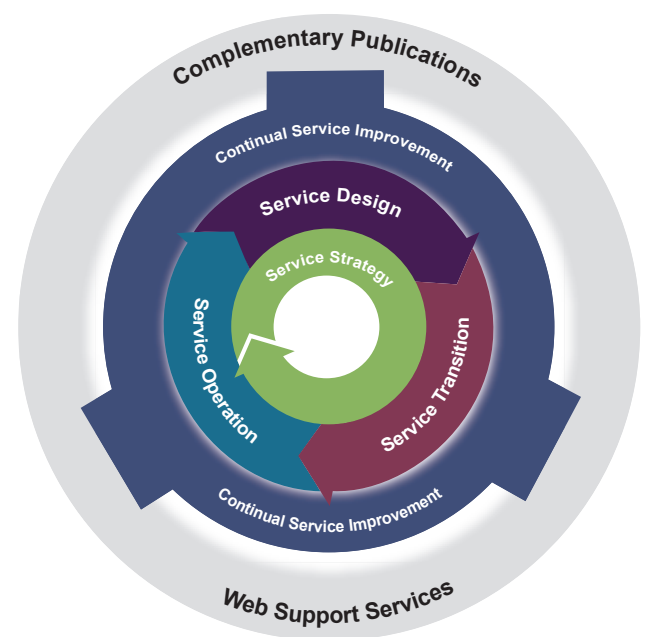
PROCESSES: Event Management, Incident Management, Request Fulfilment, Problem Management, Access Management
FUNCTIONS: Service Desk, Technical Management, IT Operations Management, Application Management

Continual Service Improvement Processes

Seven-step Improvement Process

General Concepts

- ← **Good Practices:** Are sourced from public standards and frameworks and/or from proprietary models.
- ← **Service:** Is a means of delivering value to customers by facilitating the outcomes that they want to achieve without the ownership of specific costs and Risks.
- ← **Service Management:** Is a set of specialized organizational capabilities for providing value to customers in the form of Services.
- ← **Function:** Is a team or group of people and the tools it uses to perform one or more processes or activities.
- ← **Roles:** Is the set of responsibilities defined in a process and assigned to a person or team.
- ← **Process:** Is a structured set of activities designed to accomplish a specific objective. The characteristics of these activities are Measurable, Specific Results, Deliver to Customers, and Respond to Specific Events.
- ← **Process Model:** Facilitates understanding and helps communicate the features of a process.
- ← **RACI:** Is an authority matrix used to document the roles and relationships of the stakeholders in a process, where R=Responsible, A=Accountable, C=Consult, and I=Inform.
- ← **Generic Roles:** Process Owner: Is accountable for the overall quality of the process. Service Owner: Is accountable for the delivery of a specific Service. Process Manager: Is accountable for the Operational Management of the process.





SERVICE STRATEGY

Objective: To provide guidance on designing, developing, and implementing Service Management not only as an organizational capability, but also as a strategic asset.

BASIC CONCEPTS

- ← **Utility:** Fit for Purpose – is the functionality that a product or Service offers to meet a particular need.
- ← **Warranty:** Fit for Use – is a promise or guarantee that availability, capacity, continuity, and security are all meeting customer expectations.
- ← **Service Assets:** Consist of capabilities and resources, as follows:
 - » Capabilities: Include the ability of an organization, a person, a process, an application, a Configuration Item (CI), or an IT Service to perform an activity.
 - » Resources: Include IT infrastructure, people, money, or anything else that might help deliver an IT Service.
- ← **Service Portfolio:** Contains information relating to each Service and its status within the organization and the Service Lifecycle. The Service Portfolio includes the Service Pipeline, the Service Catalogue, and Retired Services.
- ← **Business Case:** Is justification for a significant item of expenditure.
- ← **Service Model:** Describes the structure of a Service that will be delivered by Service Operation and used as a blueprint for Service Management processes and functions to communicate and collaborate on value creation.
- ← **Core Service:** Is an IT Service that delivers the basic outcomes that one or more customers desire.
- ← **Enabling Service:** needed in order for a core service to be delivered, for example, a directory Service or a backup Service.
- ← **Enhancing services:** services that are added to a core service to make it more exciting or enticing to the customer.
- ← **Service Package:** Is a detailed description of an IT Service that is available for delivery to customers and includes a Service Level Package (SLP) and one or more core and supporting Services.
- ← **Service Level Package:** Is a defined level of Utility and Warranty for a particular Service Package.
- ← **Core Service Package:** Is the detailed description of a core Service that multiple SLPs may share.
- ← **Patterns of Business Activity (PBAs):** Influence the demand patterns seen by the Service Providers.

PROCESSES

- ← **Strategy Management for IT Services:** Represents an approach to formulate Service strategies. The steps include define the market, develop the offerings, develop strategic assets, and prepare for execution.

- ← **Demand Management:** Includes activities to understand and influence customer demand for Services and the provision of capacity to meet the demand.
- ← **Service Portfolio Management:** Describes a provider's Services in terms of business value and includes the activities to design, analyze, approve, and charter a Service and the unique role of Product Manager.
- ← **Financial Management for IT Services:** Includes:
 - » Budgeting: To predict and control the IT spend.
 - » Accounting: To identify the actual costs of delivering IT Services, compare these costs and budgeted costs, and manage variances.
 - » Charging: To identify the payment structure for IT Services, if they are chargeable.
- ← **Business Relationship Management:** Includes:
 - » Helping the Service Provider define and document the outcomes in terms that can be measured by the Service Provider.



SERVICE DESIGN

Objective: To design Services that can be easily and efficiently developed and enhanced.

BASIC CONCEPTS

- ← **Service Provider:** There are three types — Internal Service Provider, Shared Services Unit, and External Service Provider.
- ← **Supplier:** Is a third party responsible for supplying the goods or Services required to deliver IT Services.
- ← **Service Level Agreement (SLA):** Describes and documents IT Services, responsibilities, and Service level targets.
- ← **Operational Level Agreement (OLA):** Is an agreement between an IT Service Provider and another part of the same business that provides Services to the Service Provider.
- ← **Service Design Package:** Contains everything necessary for the testing, introduction, and operation of a solution or Service.
- ← **Availability:** Should be measured in terms of the business, and its calculation is often based on the agreed Service time and downtime.
- ← **4 Ps:** Consist of People, Processes, Products (Services, technology, and tools), and Partners (suppliers, manufacturers, and vendors).
- ← **5 Design Aspects:** Consist of Service solutions for new or changed services, Management information systems and tools, (especially the service portfolio, including the service catalogue), Technology architectures and management architectures, The processes required, Measurement methods and metrics.

PROCESSES

- ← **Design Coordination:** ensures that organizations meet the goals and objectives of Service Design by providing and maintaining one coordination and control point for all activities and processes within this stage.

- ← **Service Level Management (SLM):** Defines, documents, agrees, monitors, measures, reports, and reviews the levels of IT Services provided.
- ← **Service Catalogue Management (SCM):**
 - » Manages the information in the Service Catalogue.
 - » Ensures that the information is accurate.
 - » Reflects the current details, status, interfaces, and dependencies of all Services that are being run or being prepared to run in the live environment.
- ← **Service Catalogue:** Contains information about all live IT Services, including those available for deployment. It is the only part of the Service Portfolio published to customers.
- ← **Availability Management:** Includes reactive and proactive activities to ensure that the level of Service availability delivered in all Services is matched to or exceeds the current and future agreed needs of the business, in a cost-effective manner.
- ← **Information Security Management:**
 - » Information is observed by or disclosed to only those who have a right to know (Confidentiality).
 - » Information is complete, accurate, and protected against unauthorized Change (Integrity).
 - » Information is available and usable when required (Availability).
 - » Business transactions, as well as information exchanges between enterprises or with partners, can be trusted (Authenticity) all through the process steps of Plan, Implement, Evaluate, and Maintain.
- ← **Supplier Management:**
 - » Ensures that value for money is obtained from suppliers and contracts.
 - » Ensures that Underpinning Contracts (UCs) with suppliers are aligned with business needs in conjunction with SLM.
 - » Manages relationships with suppliers and the Supplier and Contract Management Information System (SCMIS)
- ← **Capacity Management:** Ensures that Service performance achievements meet or exceed all their agreed targets by managing the performance and capacity of both Services and resources with a focus on Business Capacity Management, Service Capacity Management, and Component Capacity Management, and produces a Capacity Plan.
- ← **IT Service Continuity Management:** Maintains a set of IT Service Continuity Plans and IT recovery plans that support the overall Business Continuity Plans (BCPs) of the organization through the process steps of Initiation, Requirements, Strategy and Implementation, and Ongoing Operation.

Service Management is a set of specialized organizational capabilities for providing value to customers in the form of Services.



SERVICE TRANSITION

Objective: To provide guidance on the development and improvement of capabilities for transitioning new and changed Services into operation.

BASIC CONCEPTS

- ← **Service Knowledge Management System (SKMS):** Is a set of tools and databases that is used to manage knowledge and information. SKMS includes the Configuration Management System (CMS) as well as other tools and databases, for example, the Known Error Database (KEDB).
- ← **Configuration Item (CI):** Is an asset, Service component, or other item that is, or will be, under the control of Configuration Management.
- ← **Configuration Management System (CMS):** Provides reliable, quick, and easy access to accurate configuration information.
- ← **Configuration Management Database (CMDB):** Is a database used to store configuration records throughout their Lifecycle.
- ← **Definitive Media Library (DML):** Is defined as one or more locations that securely store the definitive and approved versions of all software CIs.
- ← **Service Change:** Is the addition, modification, or removal of authorized, planned, or supported Services or Service components and the associated documentation. A Service change includes the Standard, Normal, and Emergency Change types.
- ← **Change Advisory Board (CAB):** An advisory body that requires appropriate terms of reference, for example, meeting regulations and scope of influence. ECAB = Emergency CAB
- ← **Release Unit:** Describes the portions of the Service or infrastructure that are normally released together according to an organization's release policy.

PROCESSES

- ← **Change Management:** Ensures that Changes are recorded, evaluated, authorized, prioritized, planned, tested, implemented, and reviewed in a controlled manner.
- ← **Service Asset and Configuration Management:** Defines and controls the components of Services and infrastructure. It also maintains accurate configuration information on the historical, planned, and current states of the Services and infrastructure using the process steps of Managing and Planning, Configuration Identification, Configuration Control, Status Accounting and Reporting, and Verification and Audit.
- ← **Release and Deployment Management:** Ensures that a Release Package can be built, installed, tested, and deployed efficiently to a

target group or environment successfully and on schedule, with minimal unpredicted Impact on production Services, operations, and support organization.

- ← **Transition Planning and Support:** to offer complete planning for Service Transitions and to manage the resources needed.



SERVICE OPERATION

Objective: To coordinate and perform the activities and processes required to deliver and manage Services at agreed levels to business users and customers.

BASIC CONCEPTS

- ← **Alert:** Is a warning that a threshold has been reached or a Change or failure has occurred. An Alert is mainly created and managed by System Management tools.
- ← **Event:** Is a change of state that is significant for the management of a CI or an IT Service.
- ← **Incident:** Is an unplanned interruption to or a reduction in the quality of an IT Service, now or in the future.
- ← **Escalation:** Is of two types:
 - » Functional - transfers an Incident or a Problem to a technical team that has a higher level of expertise.
 - » Hierarchical - informs or involves senior levels of management.
- ← **Problem:** Is the cause of one or more Incidents in which the cause is usually not known when a Problem record is created.
- ← **Known Error:** Is a Problem that has a documented root cause and a Workaround.
- ← **Known Error Database (KEDB):** Is a database containing all the Known Error records created by Problem Management and is used by Incident and Problem Management. The KEDB is part of the SKMS.
- ← **Workaround:** Reduces or eliminates the Impact of an Incident or a Problem for which full resolution is not yet available.
- ← **Service Request:** Is a request that is normally generated by a user asking for information, advice, or a Standard Change.

PROCESSES

- ← **Event Management:** Provides the ability to detect Events, make sense of them, and determine if the appropriate control action has been provided.
- ← **Incident Management:** Restores normal Service operations as quickly as possible to minimize the adverse Impact on business operations and ensures that the best possible levels of Service quality and availability are maintained.
- ← **Request Fulfilment:** Deals with Service Requests from users and assists with general information, complaints, or comments.

- ← **Problem Management:** Prevents Problems and the resulting Incidents from occurring, eliminates recurring Incidents, and minimizes the Impact of unpreventable Incidents.

Access Management:

- » Grants authorized users the right to use a Service.
- » Prevents access by unauthorized users.
- » Ensures that the policies and actions defined in Security and Availability Management are executed with a focus on Access, Identity, and Rights Management.

- ← **Service Operation Functions:** Include the Service Desk, Technical Management, Application Management, and IT Operations Management (IT Operations Control and Facilities Management).



CONTINUAL SERVICE IMPROVEMENT

Objective: To review, analyze, and make recommendations on improvement opportunities in each Lifecycle phase to improve IT Service quality, the efficiency and effectiveness of enabling IT Service Management (ITSM) processes, and the cost-effective delivery of IT Services.

BASIC CONCEPTS

- ← **CSI Approach:** What is the vision, where are we now, where do we want to be, how do we get there, did we get there, and how do we keep the momentum going?
- ← **Deming Cycle:** Plan, Do, Check, Act
- ← **Need to Measure:** Validate, Define, Justify, and Intervene
- ← **DIKW:** The Knowledge Management approach using Data, Information, Knowledge, and Wisdom
- ← **Types of Metrics:** Technology, Service, and process, metrics

PROCESSES

- ← **Seven-step Improvement Process:** Identify the strategy for improvement, Define what you will measure, Gather the data, Process the data, Analyze the information and data, Present and use the information, and Implement improvement.