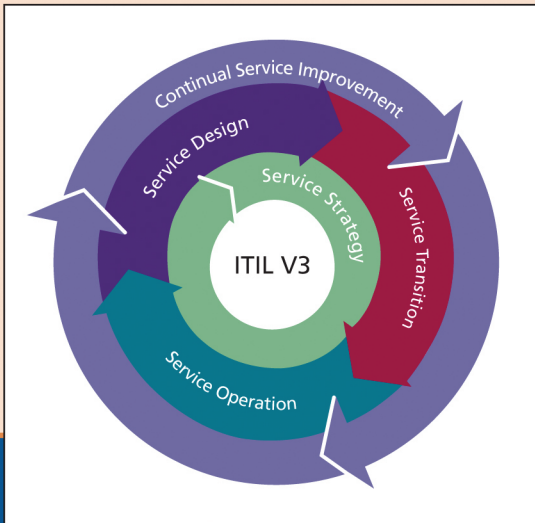


ITIL® V3 A Pocket Guide



ITIL® V3 - A POCKET GUIDE

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ITIL® V3

A P O C K E T G U I D E



Colophon

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Foreword

The long-awaited update of ITIL®, launched in June 2007, presents a rigorously updated source of best practice for IT service management. For most of the existing practitioners, trainers, consultants and other users of ITIL V2 documentation, there are significant changes as ITIL V3 follows quite a different approach. The updated version introduces the Service Lifecycle as the main structure for its guidance, whereas V2 is mainly based on processes and functions.

This concise summary offers a practical introduction to the content of the five ITIL V3 core books. It explains the structure of the new Service Lifecycle. In addition, by presenting the information about processes and functions in a separate section, it also provides support for all the existing users of V2 that are looking for a bridge to the new edition. This second section shows all the elements that were present in the Foundation-scope of ITIL V2, as well as all new processes, functions and main activities of V3.

This pocket guide provides the reader with a quick reference to the basic concepts of ITIL V3. Readers can use the Van Haren Publishing publication “Foundations of ITIL V3” or the ITIL core volumes (Service Strategy, Service Design, Service Transition, Service Operation and Continual Service Improvement) for more detailed understanding and guidance.

This pocket guide was produced in the same way as other Van Haren Publishing publications a broad team of expert editors, expert authors and expert reviewers contributed to a comprehensive text, and a great deal of effort was spent on the development and review of the manuscript.

I'm convinced that this pocket guide will provide an excellent reference tool for practitioners, students and others who want a concise summary of the key ITIL V3 concepts.

Jan van Bon
Managing Editor

Acknowledgements

Following the official publication of ITIL V3, this pocket guide was developed as a concise summary of the ITIL V3 core books, by the authors of the publication “Foundations of ITIL V3”. For reasons of continuity the Review Team of the Foundation title was the base for the pocket guide Review Team. Additionally, all members of IPESC, itSMF International’s Publication Committee, were invited to participate in the review. Thirteen itSMF chapters actively participated in the review, with seventeen reviewers providing comments after reviewing the text.

The integrated Review Team was composed of the following:

- Rob van der Burg, Microsoft, Netherlands
- Judith Cremers, Getronics PinkRocade Educational Services, Netherlands
- Dani Danyluk, Burntsand, itSMF Canada
- John Deland, Sierra Systems, itSMF Canada
- Robert Falkowitz, Concentric Circle Consulting, itSMF Switzerland
- Karen Ferris, itSMF Australia
- Peter van Gijn, LogicaCMG, Netherlands
- Jan Heunks, ICT Partners, Netherlands
- Kevin Holland, NHS, UK
- Ton van der Hoogen, Tot Z Diensten BV, Netherlands
- Matiss Horodishtiano, Amdocs, itSMF Israel
- Wim Hoving, BHVB, Netherlands
- Brian Johnson, CA, USA
- Steve Mann, SM2 Ltd, itSMF Belgium
- Reiko Morita, Ability InterBusiness Solutions, Inc., Japan
- Ingrid Ouwerkerk, Getronics PinkRocade Educational Services, Netherlands

- Ton Sleutjes, Capgemini Academy, Netherlands
- Maxime Sottini, iCONS – Innovative Consulting S.r.l., itSMF Italy

These reviewers spent their valuable hours on a detailed review of the text, answering the core question “Is the content a correct reflection of the core content of ITIL V3, given the limited size of a pocket guide?”. Providing several hundreds of valuable improvement issues, they contributed significantly to the quality of this pocket guide, and we thank them for that.

The review process was managed by Mike Pieper, editor at Inform-IT. He managed the development of this pocket guide, making sure that the procedures were followed carefully, and that all issues were followed up to the satisfaction of all reviewers. The editorial support was provided by another five expert editors from Inform-IT’s Editors Team:

- Arjen de Jong
- Axel Kolthof
- Ruby Tjassing
- Annelies van der Veen
- Tienieke Verheijen

Due to the expert services of the Review Team and the professional support by the Editors Team, the resulting pocket guide is an excellent entry into the core ITIL V3 books. We are very satisfied with the result, which will be of great value for people wanting to get a first high-level grasp of what ITIL V3 is really all about.

Jan van Bon,
Managing Editor

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1 Introduction

This pocket guide provides the reader with an overview of the basic concepts of ITIL version 3 (ITIL V3). Part 1 describes the Service Lifecycle as documented in ITIL V3 and part 2 describes the associated processes and functions.

Readers can use the publication “Foundations of ITIL V3” or the ITIL core volumes (Service Strategy, Service Design, Service Transition, Service Operation and Continual Service Improvement) for more detailed understanding and guidance.

1.1 What is ITIL?

The Information Technology Infrastructure Library™ (ITIL) offers a systematic approach to the delivery of quality IT services. ITIL was developed in the 1980s and 1990s by CCTA (Central Computer and Telecommunications Agency, now the Office of Government Commerce, OGC), under contract to the UK Government. Since then, ITIL has provided not only a best practice based framework, but also an approach and philosophy shared by the people who work with it in practice. ITIL has now been updated twice, the first time in 2000-2002 (V2), and the second time in 2007 (V3).

Several organizations are involved in the maintenance of the best practice documentation in ITIL:

- *OGC (Office of Government Commerce)* - Owner of ITIL, promoter of best practices in numerous areas including IT Service Management.
- *itSMF (IT Service Management Forum)* - A global, independent, internationally recognized not-for-profit organization dedicated to support the development of IT Service Management, e.g. through publications in the ITSM Library series. It consists of a growing number

of national chapters (40+), with itSMF International as the controlling body.

- *APM Group* - In 2006, OGC contracted the management of ITIL rights, the certification of ITIL exams and accreditation of training organizations to the APM Group (APMG), a commercial organization. APMG defines the certification and accreditation schemes for the ITIL exams, and publishes the associated certification system.
- *Examination institutes* - To support the world-wide delivery of the ITIL exams, APMG has accredited a number of exam bodies: CSME, DANSK IT, DF Certifiering AB, EXIN, ISEB, Loyalist Certification Services and TÜV SÜD Akademie. See www.itil-officialsite.com for recent information.

1.2 ITIL exams

In 2007 the APM Group launched a new qualification scheme for ITIL, based on ITIL V3. ITIL V2 will be maintained for a transition period.

ITIL V2 has qualifications on three levels:

- *Foundation Certificate* in IT Service Management
- *Practitioner's Certificate* in IT Service Management
- *Manager's Certificate* in IT Service Management

The ITIL V2 exams proved to be a great success. Up to 2000, some 60,000 certificates had been issued, in the following years the numbers rocketed, and by 2006 had broken the 500,000 mark.

For ITIL V3 a new system of qualifications has been set up. There are four qualification levels:

- *Foundation Level*
- *Intermediate Level (Lifecycle Stream & Capability Stream)*
- *ITIL Expert*
- *ITIL Master*

For more information about the ITIL V3 Qualification Scheme, see <http://www.itil-officialsite.com/qualifications>.

1.3 Structure of this pocket guide

The body of this pocket guide is set up in two Parts: Part 1 deals with the ITIL V3 Service Lifecycle, Part 2 deals with the individual functions and processes that are described in ITIL V3.

Part 1 introduces the Service Lifecycle, in the context of IT Service Management principles. In Chapters 3 to 7, each of the phases in the Service Lifecycle is discussed in detail, following a standardized structure: Service Strategy, Service Design, Service Transition, Service Operation and Continual Service Improvement.

Part 2 introduces the functions and processes that are referred to in each of the lifecycle phases. This chapter provides general information on principles of processes, teams, roles, functions, positions, tools, and other elements of interest. It also shows how the 27 processes and functions are clustered in the 5 ITIL core books.

In Chapters 9 to 13, the processes and functions are described in more detail. For each process and function, the following information is provided:

- Introduction
- Basic concepts
- Activities
- Inputs/Outputs

1.4 How to use this pocket guide

Readers who are primarily interested in getting a quick understanding of the Service Lifecycle can focus on Part 1 of the pocket guide, and pick whatever they need on functions and processes from Part 2. Readers who

are primarily interested in the functions and processes described in ITIL can focus on Part 2. This way, the pocket guide provides support to a variety of approaches to IT Service Management based on ITIL.



PART 1

THE ITIL SERVICE LIFECYCLE

2 Introduction to the Service Lifecycle

2.1 Definition of Service Management

ITIL is presented as “*good practice*”. Good practice is an approach or method that has been proven in practice. Good practices can be a solid backing for organizations that want to improve their IT services.

The ITIL Service Lifecycle is based on ITIL’s core concept of “service management” and the related concepts “service” and “value”. These core terms in service management are explained as follows:

- *Service management* - A set of specialized organizational capabilities for providing value to customers in the form of services.
- *Service* - A means of delivering value to customers by facilitating outcomes the customers want to achieve without the ownership of specific costs or risks. Outcomes are possible from the performance of tasks and they are limited by a number of constraints. Services enhance performance and reduce the pressure of constraints. This increases the chances of the desired outcomes being realized.
- *Value* - Value is the core of the service concept. From the customer’s perspective, value consists of two core components: utility and warranty. Utility is what the customer receives, and warranty is how it is provided. The concepts “utility” and “warranty” are described in the Section “Service Strategy”.

2.2 Overview of the Service Lifecycle

ITIL V3 approaches service management from the lifecycle aspect of a service. The Service Lifecycle is an organizational model that provides insight into:

- The way service management is structured.
- The way the various lifecycle components are linked to each other.

- The impact that changes in one component will have on other components and on the entire lifecycle system.

Thus, ITIL V3 focuses on the Service Lifecycle, and the way service management components are linked. Processes and functions are also discussed in the lifecycle phases.

The Service Lifecycle consists of five phases. Each volume of the new core ITIL volumes describes one of these phases. The related processes are described in detail in the phase where they have the strongest association. The five phases (domains of the core books) are:

1. Service Strategy
2. Service Design
3. Service Transition
4. Service Operation
5. Continual Service Improvement

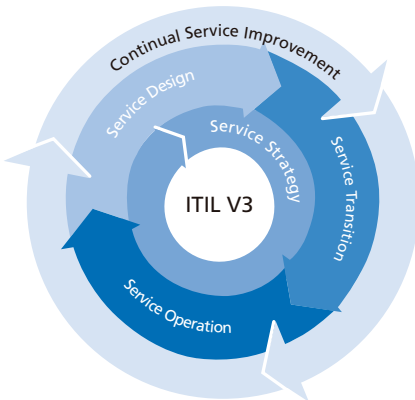


Figure 2.1 The Service Lifecycle (Based on OGC ITIL V3 material)

Service Strategy is the axis of the Service Lifecycle (Figure 2.1) that drives all other phases; it is the phase of policymaking and setting objectives. The Service Design, Service Transition and Service Operation phases are guided by this strategy, their continual theme is adjustment and change. The Continual Service Improvement phase stands for learning and improving, and embraces all other lifecycle phases. This phase initiates improvement programs and projects, and prioritizes them based on the strategic objectives of the organization.