

2012

ITIL® Service Operation (SO) Video Training Guide



itSM Solutions™ LLC
31 South Talbert Blvd #295
Lexington, NC 27292
Phone (336) 510-2885
Fax (336) 499-7016
PN: ITSMVTG

Find us on the web at: <http://www.itsmsolutions.com>.

To report errors please send a note to: support@itsmsolutions.com

For information on obtaining copies of this guide contact: sales@itsmsolutions.com

Copyright © 2012 itSM Solutions Publishing

Author: Rick Lemieux

Notice of Rights / Restricted Rights Legend

All rights reserved. Reproduction or transmittal of this guide or any portion thereof by any means whatsoever without prior written permission of the Publisher is prohibited. All itSM Solutions products are licensed in accordance with the terms and conditions of the itSM Solutions Partner License. No title or ownership of this guide, any portion thereof, or its contents is transferred, and any use of the guide or any portion thereof beyond the terms of the previously mentioned license, without written authorization of the Publisher, is prohibited.

Notice of Liability

This guide is distributed "As Is," without warranty of any kind, either express or implied, respecting the content of this guide, including but not limited to implied warranties for the guide's quality, performance, merchantability, or fitness for any particular purpose. Neither the authors, nor itSM Solutions LLC, its dealers or distributors shall be liable with respect to any liability, loss or damage caused or alleged to have been caused directly or indirectly by the contents of this guide.

Trademarks

itSM Solutions is a trademark of itSM Solutions LLC. Hands-On Foundation Certification™ is a trademark of itSM Solutions Publishing. *ITIL ® is a Registered Trade Mark, and a Registered Community Trade Mark of the Cabinet Office, and is registered in the U.S. Patent and Trademark Office, and is used here by itSM Solutions LLC under license from and with the permission from the Cabinet Office (Trade Mark License No. 0002).* IT Infrastructure Library ® is a Registered Trade Mark of the Cabinet Office and is used here by itSM Solutions LLC under license from and with the permission of the Cabinet Office (Trade Mark License No. 0002). Other product names mentioned in this guide may be trademarks or registered trademarks of their respective companies.

Document Information

► Texts with this treatment are Alerts, and indicate important concepts.

Document: Mentored Learning Video Training Guide

Revision date: 2012-02-03

Print date: 2012-02-03

ITIL® eTrainer

Mentored Learning Video Training Program

Although this online, web-based course is available to you 24 hours a day, 7 days a week over the span of your license, you must exercise the same diligence and discipline as though you were sitting in a classroom program. The following training plan was designed to help you complete the video, reading and testing components of this ITIL certification program in an orderly fashion.

Step #1 - Locate the Important Documents Included within your Video Training Program

Please make note of four very important printable documents that are included with your course. If you have difficulty with the printing options please reach out to support@itsmsolutions.com for assistance.

- **Student Manual & Study Guide** – Chapter 1's table of contents of contains a copy of the student manual. The manual includes the instructor slides with amplifying information for each slide, the course syllabus, a glossary along with other support documents. Each video module also includes a student **Study Guide** which can be used to take notes throughout the training program.
- **Syllabus** – The syllabus for each class is located at the back of the student manual.
- **Checkpoint Booklet** – The checkpoint guide provides two very different types of study aids to the student. The multiple-choice quiz helps instill the terminology and knowledge of the subject area while the scenario based exercises help expand the knowledge gained to fit the context of the overall business environment.
- **Sample Exams** – The last section of each course contains sample exams provided by the official accreditor for those students looking to sit the actual certification exam.

Step #2 - Purchase and read a copy of the ITIL Core Book associated with the classes you are taking

Although not mandatory to sit for the exam, the accreditor strongly recommends that students purchase and read a copy of the ITIL Core book associated with the class being purchased. The reading of the ITIL book will help students prepare for the exam in addition to helping them understand how to apply what they just learned in a real-world environment, ITIL core books can be purchased from our book store @ <http://www.itgovernanceusa.com/category/291.aspx> or at amazon.com

Step #3 - Join our Online Mentoring Community & Sign Up for our Continuing Education Newsletter

The first step in establishing a connection to the mentoring community is to become a member of the LinkedIn Group “My ITSM Mentoring Community.” You can do this by going online to the professional networking community www.Linkedin.com, registering as a member (if you are not already a member), and joining the group [My ITSM Mentoring Community™](#). You may go directly to the group by clicking on the “Mentoring Community” link just below the “Login” link on the opening page of the online Learning course.

Once you are a member you can post your questions on the discussion board. The discussion board is monitored daily (9 AM to 9PM Eastern Time) by our team of ITIL Expert Mentors along with other students taking the online training programs. This forum will enable you to get answers to any questions you might have as you go through the program you purchased.

Students should also [register](#) to receive our periodic Do IT Yourself (DITY) continuing education newsletter. Each newsletter provides practical guidance on the key topics associated with ITIL and ITSM. Missed an issue? The DITY™ archive contains all issues organized by topic. Select a topic of interest and browse our archive for all the back-issues.

Step #4 - Follow the Video Training Plan Listed Below

The training plan below outlines in order the reading, lectures and testing components a student must complete to successfully prepare for the exam. Please refer to them in the order shown below.

If you are attending a scheduled **classroom or blended learning program**, please follow the schedule outlined by your training provider. If you are taking a **remote program**, feel free to set up a training schedule that aligns best with personal and professional schedules.

1. Read the Syllabus Sections Identified in the Video Training Plan
This will help you become familiar with the exam qualification scheme
2. Read the Core Publication Sections Identified in the Video Training Plan
While reading the core books is not mandatory to sit for the exam, the syllabus strongly recommends it as part of it's prerequisite entry criteria
3. Watch the Video Lectures and Reach out to the Community with Questions
Watch the instructor lectures on video, refer to the student manual for amplifying information, reach out to the community with questions, take notes in the workbook & complete all module exams & checkpoints until you score an 80% or higher
4. Take the Sample Exams to Understand your Exam Readiness
Review relevant videos & courseware to shore up problem areas. Reach out to the mentoring community for exam taking advice. Work with the training provider to schedule your exam when you have scored an 80% or higher on the sample exams

ITIL® Service Operation (SO) Video Training Guide

For each section listed, read the syllabus first followed by the core book section then the video training program

Self-Paced Training Schedule (set by the student)	Chapter/Lesson/Topic	Read the Syllabus	Read the Service Operation core ITIL book sections listed below (optional but highly recommended)	Watch Videos	Section Complete √
				Take Notes in Workbook	
				Refer to Courseware for Amplifying Text	
				Complete End of Chapter Quizzes and Checkpoints	
Dates	Chapter 1: Course Introduction	Section #	Section #	Video #	
	Objectives	n/a	n/a	In Student Courseware	
	Terms-to-Know	n/a	n/a	In Student Courseware	
	Lesson 1 Course Organization			1.0	
	Welcome to the Course!	n/a	n/a	1.1	
	Mentoring Community Introductions	n/a	n/a	1.2	
	Why Are You Here?	n/a	n/a	1.3	
	Using Bloom's Taxonomy	n/a	n/a	1.4	
	What do you Expect?	n/a	n/a	1.5	
	Housekeeping Online	n/a	n/a	1.6	
	Lesson 2 Course Conventions & Agenda			2.0	
	Conventions Used	n/a	n/a	2.1	
	Quizzes & Exercises	n/a	n/a	2.2	
	ITIL Qualification Scheme	n/a	n/a	2.3	
	ITIL Intermediate Exams	n/a	n/a	2.4	
	Getting Started with an Online Class	n/a	n/a	2.5	
	End of Chapter Quiz	n/a	n/a	2.6	
	Chapter 2: Service Operation Introduction				
	Objectives	n/a	n/a	In Student Courseware	
	Terms-to-Know	n/a	n/a	In Student Courseware	
	Lesson 3 Introduction to Service Operation			1.0	
	Service Operation & the Service Lifecycle	SO01	1.2	1.1	
	Managing Across the Lifecycle	SO01	1.2	1.2	
	Purpose, Goals & Objectives of Service Operation	SO01	1.1.1	1.3	
	Scope of Service Operation	SO01	1.1.2	1.4	
	Value of Service Operation	SO01	1.1.4	1.5	
	Lesson 4 Principles of Service Operation	SS02		2	
	Fundamentals of Service Operation	SO01	3.1	2.1	
	The Principle of Service Operation	SO01	3.1	2.2	
	Balancing External & Internal Views	SO02	3.2	2.3	
	Balancing SOability & Responsiveness	SO02	3.2	2.4	
	Balancing Quality & CoSO of Service	SO02	3.2	2.5	

Balancing Reactive & Proactive	SO02	3.2	2.6
Providing Service	SO02	3.3	2.7
SO & Other Lifecycle SOages	SO02	3.4	2.8
Operational Health	SO02	3.5	2.9
Communication's Role in Service Operation	SO02	3.6	2.10
Service Operation Documentation	SO02	3.7	2.11
Lesson 5 Service Operation Summary			3.0
Service Operation Summary	n/a	n/a	3.1
Checkpoint Instructions	n/a	n/a	3.2
End of Chapter Quiz			
Chapter 2 Review			3.3
Chapter 3: Service Operation Processes			
Objectives	n/a	n/a	In Student Courseware
Terms-to-Know	n/a	n/a	In Student Courseware
Lesson 6 Event Management			1.0
The Service Operation Model	SO03	4.x	1.1
The Processes of Service Operation	SO03	4.x	1.2
Introduction	SO03	4.1.1	1.3
Objective	SO03	4.1.1	1.4
Scope	SO03	4.1.2	1.5
Value to the Business	SO03	4.1.3	1.6
Concepts	SO03	4.1.4	1.7
Activities of Event Management	n/a	n/a	1.8
Event Occurrence & Notification	n/a	n/a	1.9
Event Detection & Filtering	n/a	n/a	1.10
Event Significance & Correlation	n/a	n/a	1.11
Event Response Trigger & Selection	n/a	n/a	1.12
Event Review & Closure	n/a	n/a	1.13
Triggers, Inputs & Outputs	SO03	4.1.6	1.14
Process Relationships	SO03	4.1.6	1.15
Critical Success Factors	SO03	4.1.8	1.16
Challenges	SO03	4.1.9	1.17
Summary	n/a	n/a	1.18
Lesson 7 Incident Management			2.0
Introduction	SO03	4.2.1	2.1
Purpose, Goals & Objectives	SO03	4.2.1	2.2
Scope	SO03	4.2.2	2.3
Value to the Business	SO03	4.2.3	2.4
Concepts	SO03	4.2.4	2.5
Activities of Incident Management	SO03	4.2.5	2.6
Incident Logging	SO03	4.2.5	2.7
Incident Categorization	SO03	4.2.5	2.8
Categorization	SO03	4.2.5	2.9

Incident Priority	SO03	4.2.5	2.10
Incident Escalation	SO03	n/a	2.11
Incident Diagnosis	SO03	n/a	2.12
Incident Resolution & Recovery	SO03	n/a	2.13
Incident Closure	SO03	n/a	2.14
Expanded Incident Lifecycle	SO03	n/a	2.15
Incident Management - Roles	SO03	n/a	2.16
Triggers, Inputs & Outputs	SO03	4.2.6	2.17
Process Relationships	SO03	4.2.6	2.18
Critical Success Factors	SO03	4.2.8	2.19
Challenges & Risks	SO03	4.2.9	2.20
Summary	n/a	n/a	2.21
Lesson 8 Request Fulfillment			3.0
Introduction	SO03	4.3.1	3.1
Objective	SO03	4.3.1	3.2
Scope	SO03	4.3.2	3.3
Value to the Business	SO03	4.3.3	3.4
Concepts	SO03	4.3.4	3.5
Activities of Request Fulfillment	SO03	4.3.5	3.6
Menu Selection	n/a	n/a	3.7
Financial Approval	n/a	n/a	3.8
Other Approval	n/a	n/a	3.9
Fulfillment	n/a	n/a	3.10
Closure	n/a	n/a	3.11
Triggers, Inputs & Outputs	SO03	4.3.6	3.12
Process Relationships	SO03	4.3.6	3.13
Critical Success Factors	SO03	4.3.8	3.14
Challenges	SO03	4.3.9	3.15
Summary	n/a	n/a	3.16
Lesson 9 Problem Management			4.0
Introduction	SO03	4.4.1	4.1
Purpose, Goals & Objective	SO03	4.4.1	4.2
Scope	SO03	4.4.2	4.3
Concepts	SO03	4.4.4	4.4
Value to the Business	SO03	4.4.3	4.5
Activities of Problem Management	SO03	4.4.5	4.6
Managing the Problem	n/a	n/a	4.7
Problem Analysis Techniques	n/a	n/a	4.8
Managing the Known Error	n/a	n/a	4.9
Triggers, Inputs & Outputs	SO03	4.4.6	4.10
Relationships	SO03	4.4.6	4.11
Critical Success Factors	SO03	4.4.8	4.12
Challenges & Risks	SO03	4.4.9	4.13

Summary	n/a	n/a	4.14
Lesson 10 Access Management			5.0
Introduction	SO03	4.5.1	5.1
Purpose, Goals & Objective	SO03	4.5.1	5.2
Scope	SO03	4.5.2	5.3
Value to the Business	SO03	4.5.3	5.4
Concepts	SO03	4.5.4	5.5
Activities of Access Management	n/a	n/a	5.6
Access Request	n/a	n/a	5.7
Access Verification	n/a	n/a	5.8
Provide Rights	n/a	n/a	5.9
Monitor Identity Status	n/a	n/a	5.10
Log & Track Access	n/a	n/a	5.11
Remove or Restrict Rights	n/a	n/a	5.12
Triggers, Inputs & Outputs	SO03	4.5.6	5.13
Process Relationships	SO03	4.5.6	5.14
Critical Success Factors	SO03	4.5.8	5.15
Challenges	SO03	4.5.9	5.16
Summary	n/a	n/a	5.17
Lesson 11 Activities of Other Processes			6.0
Introduction	SO03	4.x.6.4	6.1
Change Management	SO03	4.x.6.4	6.2
Configuration Management	SO03	4.x.6.4	6.3
Release & Deployment Management	SO03	4.x.6.4	6.4
Knowledge Management	SO03	4.x.6.4	6.5
Capacity Management	SO03	4.x.6.4	6.6
Availability Management	SO03	4.x.6.4	6.7
IT Service Continuity Management	SO03	4.x.6.4	6.8
Financial Management	SO03	4.x.6.4	6.9
Lesson 12 Service Operation Summary			7.0
Service Operation Process Summary			7.1
Checkpoint Instructions	n/a	n/a	7.2
End of Chapter Quiz			
Chapter 3 Review	n/a	n/a	7.3
Chapter 4: Common Service Operation Activities			
Objectives	n/a	n/a	In Student Courseware
Terms-to-Know	n/a	n/a	In Student Courseware
Lesson 13 Common Activities			1.0
Introduction	SO04	5	1.1
Service Operation Common Activities	SO04	5	1.2
Monitoring & Control	SO04	5.1	1.3
Control Loop	SO04	5.1	1.4
IT Operations	SO04	5.2	1.5

Mainframe Management	SO04	5.3	1.6
Server Management & Support	SO04	5.3	1.7
Network Management	SO04	5.4	1.8
Storage & Archive	SO04	5.5	1.9
Database Management	SO04	5.6	1.1
Directory Services Management	SO04	5.7	1.11
Desktop Support	SO04	5.8	1.12
Middleware Management	SO04	5.9	1.13
Internet/Web Management	SO04	5.10	1.14
Facilities & Data Center Management	SO04	5.11	1.15
Data Center Strategies	SO04	5.11	1.16
IT Security Management	SO04	5.11	1.17
Improvement Activities	SO04	5.13	1.18
Lesson 14 Common Activities Summary			2.0
Service Strategy Process Summary	n/a	n/a	2.1
Checkpoint Instructions	n/a	n/a	2.2
End of Chapter Quiz			
Chapter 4 Review	n/a	n/a	2.3
Chapter 5: Service Operation Functions			
Objectives	n/a	n/a	In Student Courseware
Terms-to-Know	n/a	n/a	In Student Courseware
Lesson 15 Service Desk			1.0
Introduction to Service Operation Function	n/a	n/a	1.1
Introduction to Service Desk	SO05	6.3	1.2
Service Desk	SO05	6.3	1.3
Service Desk - Role	SO05	6.3	1.4
Service Desk - Objectives	SO05	6.3	1.5
Service Desk - Organizational Structures	SO05	6.3	1.6
Service Desk - Staffing	SO05	6.3	1.7
Service Desk - Metrics	SO05	6.3	1.8
Lesson 16 Technical Management			2.0
Introduction to Technical Management	SO05	6.4	2.1
Technical Management	SO05	6.4	2.2
Technical Management Role	SO05	6.4	2.3
Technical Management - Objectives	SO05	6.4	2.4
Technical Management - Organizational Structures	SO05	6.4	2.5
Technical Management - Design, Maintenance & Support	SO05	6.4	2.6
Technical Management - Metrics	SO05	6.4	2.7
Technical Management - Documentation	SO05	6.4	2.8
Lesson 17 Application Management			4.0
Application Management - Introduction	SO05	6.6	4.1
Application Management	SO05	6.6	4.2
Application Management Role	SO05	6.6	4.3

Application Management - Objectives	SO05	6.6	4.4
Application Management - Principles	SO05	6.6	4.5
Application Lifecycle	SO05	6.6	4.6
Application Management - Generic Activities	SO05	6.6	4.7
Application Management - Organizational Structures	SO05	6.6	4.8
Application Management Roles & Responsibilities	SO05	6.6	4.9
Application Management - Metrics	SO05	6.6	4.10
Application Management - Documentation	SO05	6.6	4.11
Lesson 18 IT Operations Management			3.0
Introduction to IT Service Operation Management	SO05	6.5	3.1
IT Operations	SO05	6.5	3.2
IT Operations - Role	SO05	6.5	3.3
IT Operations - Objectives	SO05	6.5	3.4
IT Operations - Organizational Structures	SO05	6.5	3.5
IT Operations - Metrics	SO05	6.5	3.6
Operations Management - Documentation	SO05	6.5	3.7
Lesson 19 SO Functions Summary			5.0
Service Operation Functions Summary	n/a	n/a	5.1
Checkpoint Instructions	n/a	n/a	5.2
End of Chapter Quiz			
Chapter 5 Review	n/a	n/a	5.3
Chapter 6: Service Operation Considerations			1
Objectives	n/a	n/a	In Student Courseware
Terms-to-Know	n/a	n/a	In Student Courseware
Lesson 20 Organizational Structures			1.0
Organizational Structures	SO05	6.10	1.1
Specialization Based Structures	SO05	6.10	1.2
Activity Based Structures	SO05	6.10	1.3
Process Based Structures	SO05	6.10	1.4
Geography Based Structures	SO05	6.10	1.5
Hybrid Structures	SO05	6.10	1.6
Lesson 21 SO Roles & Responsibilities			2.0
Introduction	SO05	6.7	2.1
Generic Roles	SO05	6.7	2.2
Service Owner	SO05	6.7	2.3
Process Owner	SO05	6.7	2.4
Process Manager	SO05	6.7	2.5
Process Practitioner	SO05	6.7	2.6
Service Operation Roles	SO05	6.7	2.7
Service Desk	SO05	6.7	2.8
Technical Management	SO05	6.7	2.9
IT Operations	SO05	6.7	2.1
Application Management	SO05	6.7	2.11

Event Management	SO05	6.7	2.12
Incident Management	SO05	6.7	2.13
Request Fulfillment	SO05	6.7	2.14
Problem Management	SO05	6.7	2.15
Access Management	SO05	6.7	2.16
Lesson 22 Technology Consideration			3.0
Service Operation Technology Considerations	SO06	7.1	3.1
Event Management Desired Features	SO06	7.2	3.2
Incident Management Desired Features	SO06	7.3	3.3
Request Fulfillment Desired Features	SO06	7.4	3.4
Problem Management Desired Features	SO06	7.5	3.5
Access Management Desired Features	SO06	7.6	3.6
Service Desk Desired Features	SO06	7.7	3.7
Lesson 23 Implementing Service Operation			4.0
Service Operation Implementation	SO07	8	4.1
Managing Change in SO	SO07	8.1	4.2
Service Operation & Project Management	SO07	8.2	4.3
Assessing & Managing Risk	SO07	8.3	4.4
Involvement in Design & Transition	SO07	8.4	4.5
Planning & Implementing Technology	SO07	8.5	4.6
Challenges	SO08	9.1	4.7
Critical Success Factors	SO08	9.2	4.8
Risks	SO08	9.3	4.9
Lesson 24 SO Considerations Summary			5.0
Service Operation Considerations Summary	n/a	n/a	5.1
Checkpoint Instructions	n/a	n/a	5.2
End of Chapter Quiz			
Chapter 06 Review	n/a	n/a	5.3
Course Closure	n/a	n/a	5.4
Appendix: Service Operation Lifecycle Syllabus			
Appendix: SO Process Flow Diagrams	SO02	3.8	
Appendix: Service Operation Inputs & Outputs	SO02	3.8	
Service Operation Inputs & Outputs	SO02	3.8	
Service Operation I/O with Service Strategy	SO02	3.8	
Service Operation I/O with Service Design	SO02	3.8	
Service Operation I/O with Service Transition	SO02	3.8	
Service Operation I/O with CSI	SO02	3.8	
ITIL v3 Glossary			
Exam Sample Paper #1			
Exam Sample Paper #2			

Exam Scheduling

Assuming you have scored an 80% or higher on all module exams and sample exams you are now ready to schedule and take your certification exam