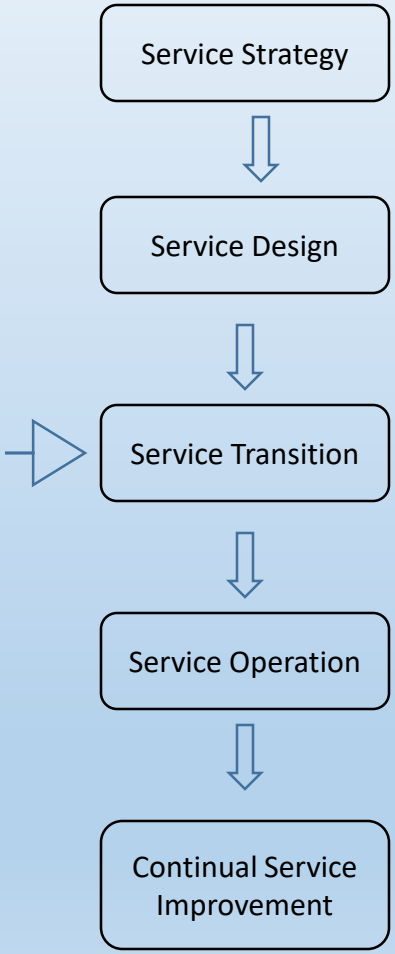
L12&13 F&P of Service Transition



- Change management
  - Change process
  - KPI of change processes
- Configuration Management
  - Configuration management system
  - Maintain service assets
- Release & Deployment Management
  - Processes involved
- Service validation & testing
  - Processes involved
- Knowledge Management
  - Processes involved

Learning outcome:

Student will be able to :

- Describe the key activities within service transition:

- Transition planning and support
- Change management
- Service asset & configuration management
- Release and deployment management
- Knowledge management
- Service validation

Service Lifecycle

Service Strategy (SS)

- Demand Management
- Service Portfolio Management
- Financial Management for IT Services
- Business Relationship Management

Service Design (SD)

- Design Coordination
- Service Level Management
- Service Catalogue Management
- Availability Management
- Capacity Management
- Information Security Management
- Supplier Management
- IT Service Continuity Management

Service Transition (ST)

- Change Management
- Service Asset and Configuration Management
- Release and Deployment Management
- Transition Planning and Support
- Knowledge Management

Service Operation (SO)

- Event Management
- Incident Management
- Request Fulfillment
- Problem Management
- Access Management

Continual Service Improvement (CSI)

- Seven-Step Improvement Process

Change Management

*Change Management

- The **objective** is to ensure that changes are recorded, assessed, prioritized, planned, tested, implemented and documented and reviewed in a controlled manner.
- The change management process must:
  - Use standardized methods and procedures.
  - Record all changes in the CMDB.
  - Take account of risks for the business.

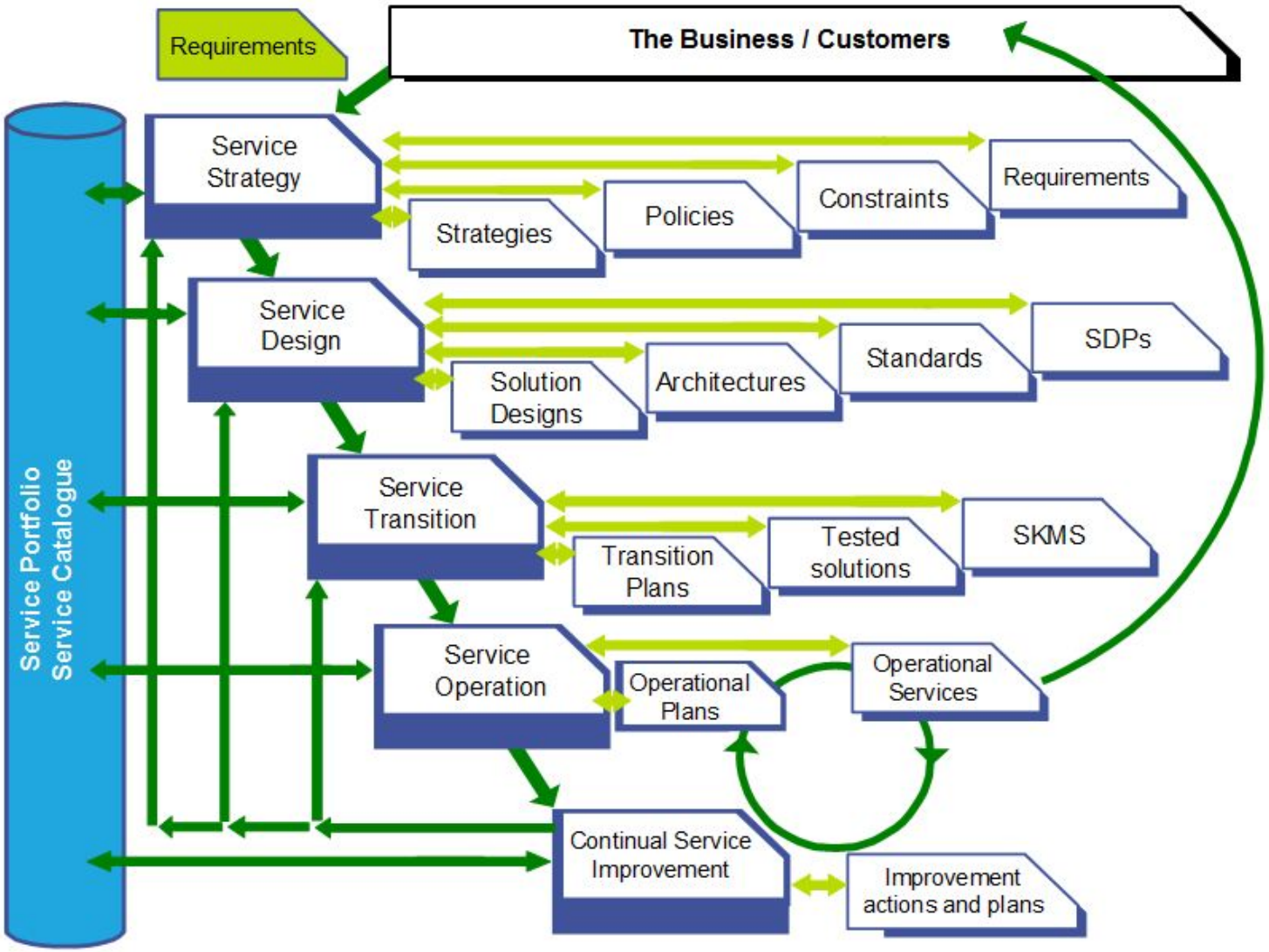
*Change Management

- **Basic concepts**
  - A **Request for Change (RFC)** is a formal request to change one or more CIs.
  - A **standard change** is a change of a service or infrastructure component that change management must register, but is of low risk and is pre-authorized.
  - An **emergency change** is intended to repair a failure (ASAP) in an IT service that has a large negative impact on the business.

*Change Management

- **Basic concepts**
  - If this requires permission from the CAB, but the full CAB cannot be convened, it is necessary to identify a smaller organization to make emergency decisions: **Emergency CAB (ECAB)**.
  - The **Change Advisory Board (CAB)** is a consultation body that meets a fixed intervals to assess changes and help change management prioritize the changes.

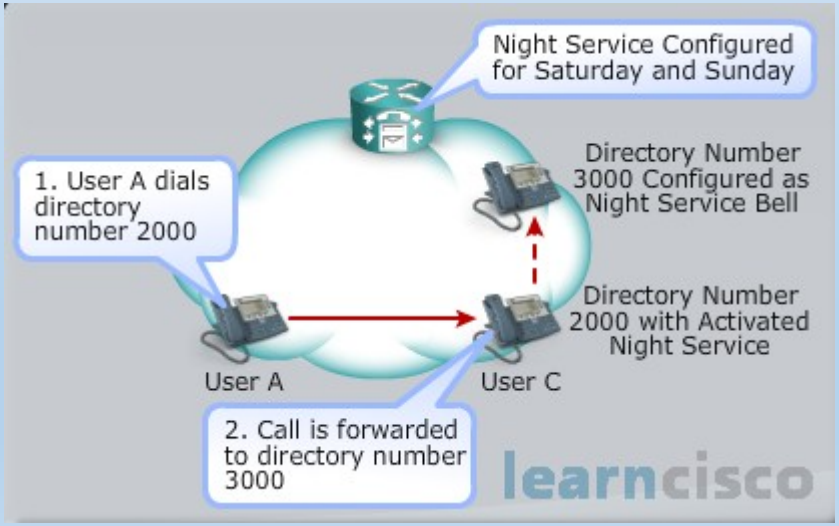
IT Service Lifecycle



*Change Management

- Overall the change management activities include:
  - Change planning and control.
  - Change and Release scheduling.
  - Communications.
  - Change decision making and authorization.
  - Ensuring there are remediation plans.
  - Measurement and control.
  - Management reporting.
  - Understanding impact.
  - Continual improvement.

Service Asset and Configuration Management



*Configuration Management

- The **purpose** of Service Asset and Configuration Management (SACM) is to provide a logical model of the IT infrastructure.
- The **objective** is: to define service and infrastructure components and maintain accurate configuration records.

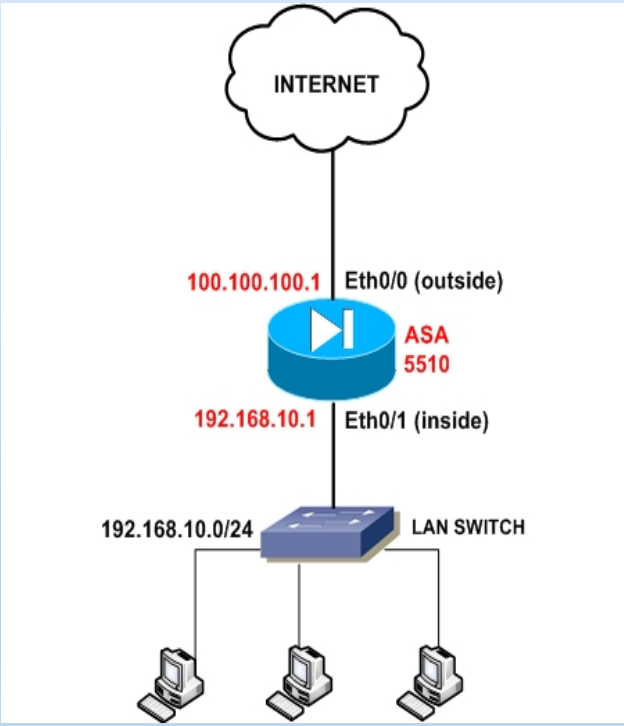
*Configuration Management

- It is important that:
  - The integrity of the services assets and Configuration Items (CIs) are protected.
  - All assets and CIs are located in configuration management system.
  - The operational and service management processes are supported effectively.

*A **configuration item** is an asset, service component or other item that is (or will be) under the control of configuration management.*

*Configuration Management

- The basic SACM process activities consist of:
  - Management and planning.
  - Configuration identification.
  - Configuration control.
  - Status accounting and reporting.
  - Verification and audit.



*Configuration Management

- Releases can be classified into the following **release categories**:
  - **Major releases** – important deployment of new hardware and software with.
  - **Minor releases** – usually contain a number of smaller improvement.
  - **Emergency releases** – usually implemented as a temporary solution for a problem or known error.

Configuration Management

Configuration control

- Ensures that the CIs are adequately managed. No CIs can be added, modified, replaced or removed without following agreed procedure.
- Establish guidelines and procedures for, among others:
  - License management.
  - Change management.
  - Version management.
  - Access control.
  - Build control.
  - Promotion.
  - Deployment.
  - Installation.
  - Baseline configurations integrity management.

*Configuration Management

Status accounting and reporting

- The lifecycle of a component is classified into different stages and the stages that different types of CI go through must be properly documented. For instance, a release goes through the following stages: registered, accepted, installed, withdrawn.
- Status reports give an insight into the current and historical data of each CI and the status changes that have occurred.
- Different type of **service asset and configuration reports** are needed for configuration management.

Release and Deployment Management

*Release Management

- ITIL defines release and deployment management as follows:

  Release and deployment management *aims to build, test and deliver the capability to provide the services specified by service design and that will accomplish the stakeholders' requirements and deliver the intended objectives.*

- The **goal** of release and deployment management is the deployment of releases into production, and the establishment of effective use of the service in order to deliver value to the customer and to be able to handover to service operation.

*Release Management

- The **objective** of release and deployment management is to ensure that:
  - Release and deployment plans are in place.
  - Release packages (compilation) are deployed successfully.
  - Knowledge transfer to the customers takes place.
  - There is minimum disruption to the services.

*Release Management

- **Basic concepts**

  *A **release** is a set of new or changed CIs that are tested and will be implemented into production together.*

  - A release unit is the portion of the service or infrastructure that is included in the release, in accordance with the organization's release guidelines.
  - It is important to determine the correct level of the release.
  - In the **release design** different considerations apply in respect of the way in which the release is deployed.

*Release Management

- The basic process activities of release and deployment management consist of:
  1. Planning
  2. Preparation for building, testing and deployment
  3. Building and testing
  4. Service testing and pilots
  5. Planning and preparing the deployment
  6. Transfer, deployment, and retirement
  7. Verify deployment
  8. Early Life Support (ELS)
  9. Review and close

Service Validation and Testing

*Service Validation

- Testing of services is an important contribution to the quality of IT service provision.
- Testing ensures that new (or changed) services are **fit for purpose** and **fit for use**.
- Fit for purpose means that the service does what the client expects of it, so that the service supports the business.
- “Fit for use” addresses such aspects as availability, continuity, capacity and security of the service.

*Service Validation

- Insufficient attention to testing may result in: increase of incidents, issues and errors, extra service desk phone calls with questions regarding the functioning of the service, higher costs and a service that is improperly used.
- The **goal** of service validation and testing is to provide a service that adds value to the customers and their business.

*Service Validation

- The **objective** of service validation and testing is to make sure that:
  - The release delivers the expected outcomes and value for the customers within projected costs, capacity and constraints
  - Services are fit for purpose and fit for use
  - Specifications (requirements) by customer and other stakeholders are met

Knowledge Management

*Knowledge Management

- The **goal** of knowledge management is to improve the quality of the (management's) decision-making process by ensuring that reliable and secure information is available during the Service Lifecycle.
- The **objectives** of knowledge management are:
  - To support the service provider in order to improve efficiency and quality of the services.
  - To ensure that the service provider's staff have adequate information available.

*Knowledge Management

- **Basic concepts**
  - The basis of the **Service Knowledge Management System (SKMS)** is formed by a considerable amount of data in a central database or configuration management system (CMS) and the CMDB: the CMDB feeds the CMS and the CMS provides input for the SKMS and so supports the decision-making process.

Functions and processes of Service Transition (Review Questions)

Q1 What is the objective of change management?

Q2 List 7 activities to manage individual change request.

Q3 List the 5 key activities in service asset configuration management (SACM)

Q4 List the key process activities of release & deployment management.

Q5 What is the goal of knowledge management?

Revision MCQ

1 Which is NOT a process within service transition ?

A) Chang management

B) Service asset and configuration management

C) Release and deployment management

D) Access management

2 Back-out plan is needed because _____

A) staff may not turn up for the deployment work during the planned period

B) changes always cause more problem for users

C) Interruption to customers should be minimised if modification is not successful

D) IT infrastructure equipment is not reliable