

ITIL® Documentation Toolkit

Please feel free to use these documents according to your companies' requirements. When deciding about sequence in which ITIL processes and/or functions will be implemented consider needs of the organization, resources required i.e. available and quick wins.

Number in the package	Document name	Relevant ITIL® process	Aligned with ITIL® guidelines
0.	Project Plan		
1.	Operations Management		
1.1.	Event Management Process	Event Management Process	✓
1.1.1.	Appendix 1 Event Management Catalogue	Event Management Process	✓
1.1.2.	Appendix 2 Event Record Template	Event Management Process	✓
1.2.	Incident Management Process	Incident Management Process	✓
1.2.1	Incident Management Policy	Incident Management Process	✓
1.2.2.	Incident Measurements And Metrics	Incident Management Process	✓
1.2.3.	Appendix 1 Incident Catalogue Template	Incident Management Process	✓
1.2.4.	Appendix 2 Incident Record Template	Incident Management Process	✓
1.2.5.	Appendix 3 Major Incident Report Template	Incident Management Process	✓
1.3.	Request Fulfillment Process	Request Fulfillment Process	✓
1.3.1.	Appendix 1 Service Request Catalogue Template	Request Fulfillment Process	✓
1.3.2.	Appendix 2 Service Request Record Template	Request Fulfillment Process	✓
1.3.3.	Appendix_3_Service Request Form Template	Request Fulfillment Process	✓

Number in the package	Document name	Relevant ITIL® process	Aligned with ITIL® guidelines
1.4.	Problem Management Process	Problem Management Process	✓
1.4.1.	Problem Management Policy	Problem Management Process	✓
1.4.2.	Appendix 1 Problem Catalogue Template	Problem Management Process	✓
1.4.3.	Appendix 2 Problem Record Template	Problem Management Process	✓
1.4.4.	Appendix 3 Major Problem Report Template	Problem Management Process	✓
1.4.5.	Appendix 4 Known Error Record Template	Problem Management Process	✓
1.4.6.	Appendix 5 Minutes of Meeting of Major Problem Review	Problem Management Process	✓
1.5.	Access Management Process	Access Management Process	✓
1.5.1.	Appendix 1 Conflicts and Exceptions Template	Access Management Process	✓
1.6.	Business Relationship Management Process	Business Relationship Management Process	✓
1.6.1.	Appendix 1 Customer Portfolio	Business Relationship Management Process	✓
1.6.2.	Appendix 2 Customer Complaint Report	Business Relationship Management Process	✓
1.6.3.	Appendix 3 Customer Satisfaction Survey	Business Relationship Management Process	✓
1.6.4.	Appendix 4 Service Performance Review Report Template	Business Relationship Management Process	✓
1.6.5.	Appendix 5 Customer Compliment Report	Business Relationship Management Process	✓
1.7.	Financial Management Process	Financial Management Process	✓

Number in the package	Document name	Relevant ITIL® process	Aligned with ITIL® guidelines
1.7.1.	Appendix 1 Budgeting and Controlling Template	Financial Management Process	✓
1.8.	Service Desk Function	Service Desk Function	✓
1.9.	Technical Management Function	Technical Management Function	✓
1.10.	IT Operations Management Function	IT Operations Management Function	✓
1.10.1.	Appendix 1 Operations Log	IT Operations Management Function	✓
1.10.2.	Appendix 2 Shift Schedule and Report	IT Operations Management Function	✓
1.11.	Application Management Function	Application Management Function	✓
1.11.1.	Appendix 1 Application Portfolio Template	Application Management Function	✓
2	Establish, Secure, Improve		
2.1.	Strategy Management for IT Services Process	Strategy Management for IT Services Process	✓
2.1.1.	Appendix 1 Strategy Plan Template	Strategy Management for IT Services Process	✓
2.2.	Design Coordination Process	Design Coordination Process	✓
2.2.1.	Appendix 1 Service Design Package	Design Coordination Process	✓
2.3.	Capacity Management Process	Capacity Management Process	✓
2.3.1.	Appendix 1 Capacity Plan	Capacity Management Process	✓
2.3.2.	Appendix 2 Capacity Measurement Report	Capacity Management Process	✓
2.4.	Availability Management Process	Availability Management Process	✓
2.4.1.	Appendix 1 Availability Plan	Availability Management Process	✓

Number in the package	Document name	Relevant ITIL® process	Aligned with ITIL® guidelines
2.4.2.	Appendix 2 Availability Measurement Report	Availability Management Process	✓
2.5.	IT Service Continuity Management (ITSCM) Process	IT Service Continuity Management Process	✓
2.5.1.	Appendix 1 IT Service Continuity Plan	IT Service Continuity Management Process	✓
2.5.2.	Appendix 2 Business Impact Analysis And Recovery	IT Service Continuity Management Process	✓
2.5.3.	Appendix 3 Risk Assessment and Treatment	IT Service Continuity Management Process	✓
2.5.4.	Appendix 4 IT Service Continuity Plan Test and Review Report	IT Service Continuity Management Process	✓
2.6.	Information Security Management Process	Information Security Management Process	✓
2.6.1.	Information Security Policy	Information Security Management Process	✓
2.6.2.	Annual Internal Audit Program	Information Security Management Process	✓
2.6.3.	Internal Audit Report	Information Security Management Process	✓
2.6.4.	Corrective or Preventive Action Form	Information Security Management Process	✓
2.7.	Demand Management Process	Demand Management Process	✓
2.8.	Continual Service Improvement Process	Continual Service Improvement Process	✓
2.8.1.	Appendix 1 Service Improvement Plan	Continual Service Improvement Process	✓
3	Deployment, Control and Knowledge		

Number in the package	Document name	Relevant ITIL® process	Aligned with ITIL® guidelines
3.1.	Transition Planning and Support Process	Transition Planning and Support Process	✓
3.1.1.	Appendix 1 Transition Plan	Transition Planning and Support Process	✓
3.2.	Change Management Process	Change Management Process	✓
3.2.1.	Change Management Policy	Change Management Process	✓
3.2.2.	Appendix 1 Request for Change and Change Record	Change Management Process	✓
3.2.3.	Appendix 2 Minutes of Meeting CAB	Change Management Process	✓
3.2.4.	Appendix 3 Change Schedule	Change Management Process	✓
3.3.	Service Asset and Configuration Management (SACM) Process	Service Asset and Configuration Management Process	✓
3.3.1.	Appendix 1 SACM Plan	Service Asset and Configuration Management Process	✓
3.3.2.	Appendix 2 CMDB	Service Asset and Configuration Management Process	✓
3.4.	Service Validation and Testing (SVT) Process	Service Validation and Testing Process	✓
3.4.1.	Appendix 1 SAC Template	Service Validation and Testing Process	✓
3.4.2.	Appendix 2 Test Plan	Service Validation and Testing Process	✓
3.5.	Release and Deployment Management (RDM) Process	Release and Deployment Management Process	✓
3.5.1.	Appendix 1 Release and Deployment Planning	Release and Deployment Management (RDM) Process	✓
3.5.2.	Appendix 2 Customer Release and Deployment Policy	Release and Deployment Management (RDM) Process	✓

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3.6.	Change Evaluation Process	Change Evaluation Process	✓
3.7.	Knowledge Management (KM) Process	Knowledge Management Process	✓
3.7.1.	Appendix 1 Knowledge Management Plan Template	Knowledge Management Process	✓
3.7.2.	Appendix 2 Training and Awareness Plan	Knowledge Management Process	✓
4	Relationship Management		
4.1.	Service Portfolio Management Process	Service Portfolio Management Process	✓
4.1.1.	Appendix 1 Service Portfolio List Template	Service Portfolio Management Process	✓
4.1.2.	Appendix 2 Business Case	Service Portfolio Management Process	✓
4.1.3.	Appendix 3 Change Proposal	Service Portfolio Management Process	✓
4.1.4.	Appendix 4 Service Charter Template	Service Portfolio Management Process	✓
4.2.	Service Catalogue Management Process	Service Catalogue Management Process	✓
4.2.1.	Appendix 1 Service Catalogue Template	Service Catalogue Management Process	✓
4.3.	Service Level Management Process	Service Level Management Process	✓
4.3.1.	Appendix 1 SLA Template	Service Level Management Process	✓
4.3.2.	Appendix 2 OLA Template	Service Level Management Process	✓
4.3.3.	Appendix 3 Service Report Template	Service Level Management Process	✓
4.3.4.	Appendix 4 Customer Agreement Portfolio	Service Level Management Process	✓

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4.3.5.	Appendix 5 Service Level Requirements	Service Level Management Process	✓
4.4.	Supplier Management Process	Supplier Management Process	✓
4.4.1.	Appendix 1 Underpinning Contract Template	Supplier Management Process	✓
4.4.2.	Appendix 2 Supplier Performance Report Template	Supplier Management Process	✓
4.4.3.	Appendix 3 Supplier Agreement Portfolio	Supplier Management Process	✓

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