

## Document Control Information

Document Details	
Document Name	The ITIL Intermediate Qualification: Planning, Protection and Optimization Certificate_v3.0
Purpose of Document	Provide a detailed syllabus for the ITIL Intermediate Qualification: Planning, Protection and Optimization
Document Version Number	3.0
Document Status	Live
Document Owner	Chief Examiner
Prepared By	V3 Examination Panel
Date of First Draft	August 2007
Date Approved	13 August 2008
Approved By	Chief Examiner
<b>Next Scheduled Review Date</b>	

Version History		
Version Number	Date Approved	Change/Reasons for Change/Comments
3.0	13 August 2008	New Document

Distribution List		
Version	Name	Title/Company
3.0	All ITIL EIs and ATOs	



## **Professional Qualifications for**

# **ITIL® PRACTICES FOR SERVICE MANAGEMENT: INTERMEDIATE CAPABILITY STREAM**

### ***The ITIL Intermediate Qualification: Planning, Protection and Optimization Certificate SYLLABUS***



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The ITIL Intermediate Qualification\_Planning Protection and Optimization Certificate\_v3.0.doc – 13 August 2008  
Version 3.0 (Status – Live) Document owner – Chief Examiner

# **THE ITIL INTERMEDIATE QUALIFICATION: PLANNING, PROTECTION AND OPTIMIZATION CERTIFICATE**

The ITIL Intermediate Qualification: Planning, Protection and Optimization (PPO) Certificate is a free-standing qualification, but is also part of the ITIL Intermediate Capability stream, and one of the modules that leads to the ITIL Expert in IT Service Management Certificate.. The purpose of this training module and the associated exam and certificate is, respectively, to impart, test, and validate the knowledge on industry practices in Service Management as documented in the ITIL Service Lifecycle core publications.

The ITIL Certificate in Planning, Protection and Optimization is intended to enable the holders of the certificate to apply the practices during the Service Management Lifecycle.

## **Target Group**

The target group of the ITIL Certificate in Planning, Protection and Optimization is:

- Individuals who have attained the V3 ITIL Foundation certificate in Service Management, or the V3 Foundation Bridge certificate and who wish to advance to higher level ITIL certifications.
- Individuals who require a deep understanding of ITIL Certificate in the Service Offerings and Agreement processes and how it may be used to enhance the quality of IT service support within an organisation.
- IT professionals that are working within an organisation that has adopted and adapted ITIL who need to be informed about and thereafter contribute to an ongoing service improvement programme
- Operational staff involved in Capacity Management, Availability Management, ITSCM, Information Security Management, Demand Management, Risk Management, who wish to enhance their role-based capabilities.

This may include but is not limited to, IT professionals, business managers and business process owners.

## **Learning Objectives**

Candidates can expect to gain competencies in the following upon successful completion of the education and examination components related to this certification:

- Service Management as a Practice
- Processes across the Service Lifecycle pertaining to the practice elements within Planning, Protection and Optimization
- Capacity management as a capability to realise successful service design
- Availability management as a capability to realise successful service design
- IT Service Continuity Management as a capability to support overall Business Continuity Management
- Information security management as part of the overall corporate governance framework
- Planning, Protection and Optimization roles and responsibilities
- Technology and Implementation Considerations
- Challenges, Critical Success Factors and risks

### **And specifically in the following key ITIL process and role areas**

- Capacity Management
- Availability Management
- IT Service Continuity Management
- Information Security Management
- Demand Management

- Challenges, Critical Success Factors and Risk Management For Service Planning, Protection and Optimization

### **Prerequisite Entry Criteria**

Candidates wishing to be trained and examined for this qualification must already hold the ITIL Foundation Certificate in IT Service Management (the V3 Foundation or V2 Foundation plus Bridge Certificate) which shall be presented as documentary evidence to gain admission.

It is also strongly recommended that candidates:

- Can demonstrate familiarity with IT terminology and understand the context of Planning, Protection and Optimization management of their own business environment is strongly recommended.
- Have exposure working in the service management capacity within a service provider environment, with responsibility emphasizing on at least one of the following management processes:
  - Capacity Management Process
  - Availability Management Process
  - IT Service Continuity Management (ITSCM) Process
  - Information Security Management Process
  - Demand Management Process Challenges, Critical Success Factors and Risk Management For Service Planning, Protection and Optimization

It is recommended that candidates are familiar with the guidance detailed in the ITIL Service Lifecycle Practices core publications prior to attending training for this certification, in particular, the Service Design publication.

### **Eligibility for Examination**

To be eligible for the examination leading to an accredited ITIL Certificate in Planning, Protection and Optimization, the candidate must fill the following requirements:

- At least 30 contact hours (hours of instruction, excluding breaks, with an Accredited Training Organisation (ATO) or an accredited e-learning solution) for this syllabus, as part of a formal, approved training course/scheme
- There is no minimum mandatory requirement but 2 to 4 years professional experience working in IT Service Management is highly desirable
- Hold the ITIL V3 Foundation Certificate in IT Service Management or ITIL V2 Foundation plus the bridging certificate
- It is also recommended that students should complete at a minimum 12 hours of personal study by reviewing the syllabus and the pertinent areas of the ITIL Service Management Practice core guidance publications and in particular, the Service Design publication

## Level of Difficulty

All ITIL Service Management certifications use the Bloom's taxonomy in both the construction of the learning units and in the examination which is based on this syllabus.

A learning taxonomy is a scale of the degree of difficulty in the learning process. These levels apply to the cognitive, affective and psychomotor domains of learning but in the ITIL Qualification Scheme, we deal only with the cognitive sphere.

Bloom defines six levels of learning in the COGNITIVE domain which are both sequential and cumulative. They move from the simple to the complex. This implies that in order to achieve the sixth level of learning, for example, the instructor must ensure that the previous five levels have been mastered.

**The KNOWING level:** Here the student is able to bring to mind or remember the appropriate material. The behavioural tasks associated with this level tax the student's memory and include such tasks as defining, recalling, listing, recognizing, describing and naming.

**The COMPREHENDING stage:** Here the student is able to understand or grasp the meaning of what is being communicated and make use of the idea without relating it to other ideas or materials and without seeing the fullest possible meaning or translation of the idea. Behavioural tasks at this level would include stating in the students own words, giving examples of, illustrating, inferring, summarizing and interpreting. These actions involve the knowing which has taken place at the first level.

**The APPLYING level:** Here the student should be able to use ideas, principles and theories in new, particular and concrete situations. Behavioural tasks at this level involve both knowing and comprehension and might include choosing appropriate procedures, applying principles, using an approach or identifying the selection of options.

**The ANALYZING level:** This is the fourth level of learning described by Bloom. At this level the student is able to break down a communication (rendered in any form) into constituent parts in order to make the organization and significance of the whole clear. Breaking down, discriminating, diagramming, detecting, differentiating and illustrating are important behavioural tasks at this level and can be seen to include the previous levels of knowing, comprehending and applying. Here the significance of the constituent parts of an entity are examined in order to understand the whole more fully.

**The SYNTHESIS level:** At this level the student is able to put back together again the various parts or elements of a concept into a unified organization or whole. This putting together again and making sense of small parts is a crucial factor in intelligence and learning. Behavioural tasks at this level would include creating, writing, designing, combining, composing, organizing, revising and planning. This level of learning in order to occur must include the first four levels – knowing, comprehending, analyzing and applying. This level of learning is probably the most intense and exciting for student and teacher alike.

**The EVALUATING phase:** In this phase the student is able to arrive at an overview and to judge the value and relative merit of ideas or procedures by using appropriate criteria. At this level of learning the student will be able to compare, judge, appraise, justify, criticize and contrast theories, procedures, methods and concepts. This level involves mastery of the five previous levels of knowing, comprehending, applying analyzing and synthesizing.

For the purposes of the ITIL Qualifications Scheme, the Blooms level will appear in each syllabus module to identify the highest level of cognitive difficulty that course content should deliver to meet the learning outcome and competence to meet the examination level of difficulty.

The following table illustrates the use of the taxonomy in ITIL professional qualifications.

Bloom Levels and taxonomy	Used by ITIL certification	Intellectual activity in learning outcome and exam proficiency
Knowing Comprehending	ITIL Service Management Foundation Level stream (includes V2 – V3 Foundation Bridge certification)	The ability to recall, recite, name, and understand the meaning of ITIL terminology and basic practice fundamentals.  <i>Vernacular examples used in Syllabus:</i>  Understand; Describe; Identify
Applying Analyzing	ITIL Service Management  Lifecycle Stream Capability Stream Managing Across the Lifecycle	The ability to use the practices and concepts in a situation or unprompted use of an abstraction. Can apply what is learned in the classroom, in workplace situations. Can separate concepts into component parts to understand structure and can distinguish between facts and inferences.  <i>Vernacular examples used in Syllabus:</i>  Analyze; Demonstrate; Apply; Distinguish; Justify; Produce; Decide
Synthesis Evaluate	ITIL Service Management  Managing Across the Lifecycle – level 5 only  ITIL Service Management Professional – Advanced Series	The ability to create patterns or structure from composite elements to achieve a new meaning or outcome. Can make judgement, weigh options of ideas and elements to justify and support an argument or case.  <i>Vernacular examples used in Syllabus:</i>  Evaluate; Justify; Summarize; Plan; Modify; Manage; Control

Intermediate stream qualifications will examine according to the Bloom level assigned to each syllabus learning unit within each of the Service Lifecycle and Service Capability streams. This means that a student must be prepared to be tested up to and including that level for any question related to that learning unit or units.

The examination format of complex multiple choice will offer a scenario and questions with a corresponding series of possible answers. Each is constructed to test a student's competency up to and including the bloom level associated to the syllabus learning unit that the question is mapped to. Instructors should ensure that the module curriculum offers discussion, practical exercises and instruction that will satisfy the competency needed to meet the exam level of difficulty.

The intermediate modules are expected to provide a practical level of proficiency for a student to be able to utilize the knowledge learned in their work environment. The examinations test a level of proficiency that allows students to apply the knowledge learned in the course to correctly select the correct sequence of possible answers.

## Planning, Protection and Optimization Syllabus

The ITIL Intermediate Qualification: Planning, Protection and Optimization is awarded to those who complete the following nine units of study and successfully pass the relevant examination. The units cover the topics listed (section numbers from the source publications are included along with indicative contact study hours).

<p><b>ITIL SC:</b> <b>PPO01</b> <b>Level of Difficulty – up to Bloom level 2</b></p>	<p><b>Introduction</b></p> <p>This unit introduces the candidate to the concepts and terminology of the Service Lifecycle and the role of PPO within the Lifecycle.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand and describe:</p> <ul style="list-style-type: none"> <li>• Service Management as a practice (SD 2.1.1)</li> <li>• The concept of Service, its value proposition and composition (SD 2.2.1)</li> <li>• The functions and process across the Lifecycle (SD 2.3.1, 2.3.2, 2.3.3)</li> <li>• The role of the processes in the Service Lifecycle (SS 2.6.3)</li> <li>• How Service Management creates business value (SS 3.1, ST 2.4.3, SO 2.4.3, SD2.4.3)</li> <li>• How the processes within Planning, Protection and Optimization practices support the Service Lifecycle, including their roles and responsibilities (ST 2.4.6, SO 2.4.5.4, SD 4.6)</li> </ul> <p><i><b>The recommended minimum study period for this unit is 1.5 hours.</b></i></p>
<p><b>ITIL SC:</b> <b>PPO02</b> <b>Level of difficulty – up to Bloom level 4</b></p>	<p><b>Capacity Management</b></p> <p>This unit covers the Capacity Management process and how it contributes to Planning, Protection and Optimization.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> <li>• The purpose, goal and objectives of Capacity Management (SD 4.3.1)</li> <li>• The scope of Capacity Management (SD 4.3.2)</li> <li>• The importance of Capacity Management as a process to generate business value (SD 4.3.3)</li> <li>• Capacity Management policies, principles and basic concepts (SD 4.3.4)</li> <li>• The main activities, methods and techniques that enable Capacity Management and how they relate to Planning, Protection and Optimization. (SD 4.3.5)</li> <li>• The triggers, inputs and outputs of Capacity Management and its interfaces with other processes (SD 4.3.6)</li> <li>• How the key metrics can be used to demonstrate the efficiency and effectiveness of successful Capacity Management (SD 4.3.7)</li> </ul> <p><i><b>The recommended minimum study period for this unit is 4.0 hours.</b></i></p>

<p><b>ITIL SC:</b></p> <p><b>PPO03</b></p> <p><b>Level of difficulty – up to Bloom level 4</b></p>	<p><b>Availability Management</b></p> <p>This unit covers the Availability Management process and how it contributes to Planning, Protection and Optimization.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> <li>• The purpose, goal and objectives of the process (SD 4.4.1)</li> <li>• The scope of the process (SD 4.4.2)</li> <li>• The importance of Availability Management as a process to generate business value (SD 4.4.3)</li> <li>• Availability Management policies, principles and basic concepts (SD 4.4.4)</li> <li>• The main activities, methods and techniques that enable Availability Management and how they relate to Planning, Protection and Optimization. (SD 4.4.5)</li> <li>• The triggers, inputs and outputs of Availability Management, and its interface with other processes (SD 4.4.6)</li> <li>• How the key metrics can be used to demonstrate the efficiency and effectiveness of successful Availability Management (SD 4.4.7)</li> </ul> <p><b><i>The recommended minimum study period for this unit is 5.0 hours.</i></b></p>
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<p><b>ITIL SC:</b></p> <p><b>PPO04</b></p> <p><b>Level of difficulty – up to Bloom level 4</b></p>	<p><b>IT Service Continuity Management</b></p> <p>This unit covers the IT Service Continuity Management (ITSCM) process and how it contributes to Planning, Protection and Optimization.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> <li>• The purpose, goal and objectives of the process (SD 4.5.1)</li> <li>• The scope of the process (SD 4.5.2)</li> <li>• The importance of ITSCM as a process to generate business value (SD 4.5.3)</li> <li>• ITSCM policies, principles and basic concepts (SD 4.5.4)</li> <li>• The main activities, methods and techniques that enable ITSCM and how they relate to Planning, Protection and Optimization, particularly Stage 1 of the ITSCM lifecycle, <b>Initiation</b> (SD 4.5.5.1)</li> <li>• The main activities, methods and techniques that enable ITSCM and how they relate to Planning, Protection and Optimization, particularly Stage 2 of the ITSCM lifecycle, <b>Requirements and Strategy</b> (SD 4.5.5.2)</li> <li>• The main activities, methods and techniques that enable ITSCM and how they relate to Planning, Protection and Optimization, particularly Stage 3 of the ITSCM lifecycle, <b>Implementation</b> (SD 4.5.5.3)</li> <li>• The main activities, methods and techniques that enable ITSCM and how they relate to Planning, Protection and Optimization, particularly Stage 4 of the ITSCM lifecycle, <b>Ongoing Operation</b> (SD 4.5.5.4)</li> <li>• The triggers, inputs and outputs of ITSCM, and its interface with other processes (SD 4.5.6)</li> <li>• How the key metrics can be used and applied to demonstrate the efficiency and effectiveness of successful IT Service Continuity Management (SD 4.5.7)</li> </ul> <p><b><i>The recommended minimum study period for this unit is 5.0 hours.</i></b></p>
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<p><b>ITIL SC:</b> <b>PPO05</b> <b>Level of difficulty – up to Bloom level 4</b></p>	<p><b>Information Security Management</b></p> <p>This unit covers the Information Security Management process and how it contributes to Planning, Protection and Optimization.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> <li>• The purpose, goal and objectives of the process (SD 4.6.1)</li> <li>• The scope of the process (SD 4.6.2)</li> <li>• The importance of Information Security Management as a process to generate business value (SD 4.6.3)</li> <li>• Information Security Management policies, principles and basic concepts (SD 4.6.4)</li> <li>• The main activities, methods and techniques that enable this process and how they relate to Planning, Protection and Optimization (SD 4.6.5)</li> <li>• The triggers, inputs and outputs of Information Security Management and its interface with other processes (SD 4.6.6)</li> <li>• How the key metrics can be used and applied to demonstrate the efficiency and effectiveness of successful Information Security Management (SD 4.6.7)</li> </ul> <p><b><i>The recommended minimum study period for this unit is 4.0 hours.</i></b></p>
<p><b>ITIL SC:</b> <b>PPO06</b> <b>Level of difficulty – up to Bloom level 4</b></p>	<p><b>Demand Management</b></p> <p>This unit covers the Demand Management process and how it contributes to Planning, Protection and Optimization.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> <li>• The basic concepts of Demand Management (SS 5.5.1)</li> <li>• The activity based Demand Management and business activity patterns (SS 5.5.2, 5.5.3, SS figure 5.23)</li> <li>• The interfaces to Service Design (SS 5.5.2)</li> <li>• Managing demand for Service (SS 5.5.3, SS table 5.8, SS table 5.9)</li> <li>• Analyze and discuss the main activities, methods and techniques that enable this process and how they relate to Planning, Protection and Optimization. (SS 5.5.2, 5.5.3, 5.5.4, 5.1.2.2, 7.4.3)</li> </ul> <p><b><i>The recommended minimum study period for this unit is 2.0 hours.</i></b></p>

<p><b>ITIL SC:</b> <b>PPO07</b> <b>Level of difficulty – up to Bloom level 4</b></p>	<p><b>Challenges, Critical Success Factors and Risks</b></p> <p>This unit covers Challenges, Critical Success Factors and Risks and how they contribute to Planning, Protection and Optimization.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> <li>• The challenges, Critical Success Factors and risks are, related to Capacity and Demand Management (SD 4.3.9,SS 9.5.5, 9.5.6)</li> <li>• What the challenges, Critical Success Factors and risks are, related to Availability Management (SD 4.4.9)</li> <li>• What the challenges, Critical Success Factors and risks are, related to ITSCM (SD 4.5.9)</li> <li>• What the challenges, Critical Success Factors and risks are, related to Information Security Management (SD 4.6.9)</li> <li>• Explain the challenges, Critical Success Factors and risks directly associated with Service Design phase of the Service Lifecycle and how it relates specifically to PPO (SD 9.1, 9.2)</li> </ul> <p><i>The recommended minimum study period for this unit is 2.0 hours.</i></p>
<p><b>ITIL SC:</b> <b>PPO08</b> <b>Level of difficulty – up to Bloom level 4</b></p>	<p><b>Planning, Protection and Optimization Roles and Responsibilities</b></p> <p>This unit enables the candidate to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze how Service roles and responsibilities contribute to Planning, Protection and Optimization. Specifically a candidate must be able to:</p> <ul style="list-style-type: none"> <li>• Recognize the key roles / functions responsible for executing each process step as related to: <ul style="list-style-type: none"> <li>• Capacity Management process (SD 6.4.9)</li> <li>• Availability Management process (SD 6.4.7)</li> <li>• IT Service Continuity Management process (SD 6.4.8)</li> <li>• Information Security Management process (SD 6.4.10)</li> </ul> </li> </ul> <p><i>The recommended minimum study period for this unit is 2.0 hours.</i></p>

<p><b>ITIL SC:</b> <b>PPO09</b> <b>Level of difficulty – up to Bloom level 4</b></p>	<p><b>Technology and Implementation Considerations</b></p> <p>This unit covers Technology and Implementation Considerations and how they contribute to Planning, Protection and Optimization.</p> <p>To meet the learning outcomes and examination level of difficulty, the candidates must be able to understand, describe, identify, demonstrate, apply, distinguish, produce, decide or analyze:</p> <ul style="list-style-type: none"> <li>• the generic requirements for technology to assist Service Design (SO 7.1.1, 7.1.2, 7.1.3, 7.1.4, 7.1.5, 7.1.6, 7.1.7, 7.1.8, 7.1.9)</li> <li>• the evaluation criteria for technology and tooling for process implementation (SD 7.2)</li> <li>• the good practices for practice and process implementation (SD 8.2, 8.3, 8.4)</li> <li>• the challenges, Critical Success Factors and risks related to implementing practices and processes (ST 9.1, 9.2, 9.3, SO 9.1, 9.2, 9.3, SD 9.1, 9.2)</li> <li>• How to plan and implement Service Management technologies (SO8.5)</li> <li>• The consideration for implementing technologies in supporting the processes within Planning, Protection and Optimization practice, in particular, designing technology architectures (SD 3.6.3)</li> </ul> <p><i>The recommended minimum study period for this unit is 3.0 hours.</i></p>
<p><b>ITIL SC:</b> <b>PPO10</b></p>	<p><b>Summary, Exam Preparation and Directed Studies</b></p> <p>This unit summarises the material covered in the previous units and prepares candidates for the examination. It is likely that most course providers will wish to offer, and review, at least one mock examination opportunity.</p> <p><i>The recommended minimum study period for this unit is 2.0 hours.</i></p>

**Note:****Lecture and exercises**

Meeting the learning objectives of this syllabus can be assisted through the use of practical exercises during the delivery of an accredited course. It is recommended that course providers make use of exercises to enhance the reinforcement of the learning objectives in this syllabus. To aid course providers, there are areas within each learning unit whose learning objective include such phrases as “illustrate, discuss, use examples”, etc, which may be considered as opportunities to introduce practical course exercises. These are not mandated areas for practical exercises, but provided as suggestions for use by course providers.

**Learning outcomes**

Following completion of this unit, the candidate will possess knowledge of:

- The importance of Service Management as a Practice concept and Service Operation Principles, Purpose and Objective
- The importance of ITIL Planning, Protection and Optimization while providing service
- How all processes in ITIL Planning, Protection and Optimization interact with other Service Lifecycle Processes
- The processes, activities, methods and functions used in each of the ITIL Planning, Protection and Optimization processes
- How to use the ITIL Planning, Protection and Optimization processes, activities and functions to achieve operational excellence
- How to measure ITIL Planning, Protection and Optimization
- The importance of IT Security and its contributions to ITIL Planning, Protection and Optimization
- Understanding of technology and implementation considerations surrounding ITIL Planning, Protection and Optimization Challenges, Critical Success Factors and Risks associated to ITIL Planning, Protection and Optimization
- Challenges, Critical Success Factors and Risks associated to ITIL Planning, Protection and Optimization

## Format of the Examination

Type	Eight (8) multiple choice, scenario-based, gradient scored questions. Each question will have 4 possible answer options, one of which is worth 5 marks, one which is worth 3 marks, one which is worth 1 mark, and one which is a distracter and achieves no marks.
Duration	Maximum 90 minutes for all candidates in their respective language (Candidates sitting the examination in a language other than their first language have a maximum of 120 minutes and are allowed to use a dictionary)
Prerequisite	ITIL V3 Foundation Certificate or ITIL V2 Foundation plus Bridge Certificate and completion of an accredited Course from an ITIL Accredited Training Provider
Supervised	Yes
Open Book	No
Pass Score	28/40 or 70%
Distinction Score	TBC
Delivery	Online or Paper Based Examination

## Criteria of Training Competence

This syllabus can only be delivered to target groups by an accredited provider / trainer. Any provider/trainer must hold the following qualifications to be eligible to provide this syllabus:

Criteria	Eligibility	Degree of proficiency validation
Accredited Training Organization	Required	The company shall be registered and in good standing with the Official Accreditor
ITIL Planning, Protection and Optimization Certification	Required	Instructor must present a valid certificate issued by an accredited Examination Institute
ITIL V3 Expert Certification	Required	Instructor must present a valid certificate issued by an accredited Examination Institute

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