ITSM 2007 Release guide

Clientele / Epicor ITSM

Disclaimer

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Introducing ITSM version 2007

Introduction

For 9 years Mproof customers have come to expect valuable enhancements to the product suites on a regular basis. Release 2007 is no exception, delivering new features that offer more configurability and functional capabilities for your business.

ITSM 2007 reflects our fundamental philosophy as a software provider:

- Place customers at the center of everything we do
- Develop and deliver world-class software to help our customers achieve operational excellence
- Provide innovative technologies that empower our customers to become market leaders
- Surround our customers with resources and self-service tools to provide world-class customer service and satisfaction
- Deliver single point accountability in everything we do

What's Inside

This guide covers the features, functionality and technology introduced with ITSM 2007. It also provides information on professional services, product support, education and other important topics related to this release. Please note that all information in this document is subject to change without notice.

ITSM 2007 Key Objectives

At Mproof, we are committed to responding to our customers by enhancing and expanding product functionality, investing in new technologies, and providing overall value with our products. In keeping with this ongoing effort, we established a list of objectives for release 2007 of ITSM. Here are the objectives and how we've accomplished them:

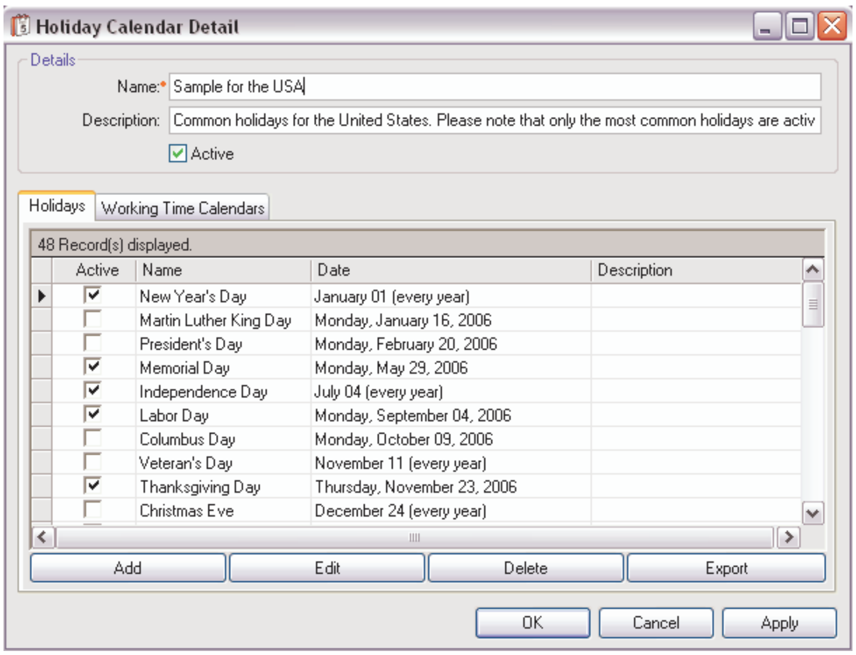
Objective	**Achievement**
Support for Microsoft SQL Server 2005	ITSM has been tested against Microsoft's latest release of SQL Server, version 2005, which is the first such release for some considerable time and offers users substantial improvements in terms of scalability, administration and performance.
Provide templates for Service Agreements	A feature desired by organizations with standard Service Agreements so they can easily create new Service Agreements for customers.
Improve compliancy	In several areas, audit trails and security is enhanced to be better prepared for compliancy
Notification enhancements	New feature to send notifications when a support call is changed.
Provide key missing feature holiday calendar and Working Time Calendar	Customers, using ITSM for advanced service level management, told us support for multiple Working Time Calendars is critical to configure SLA's. To support WTC, holiday calendars are part of this functionality.
Deliver high priority customer requested enhancements	Version 2007 incorporates the results of many customer software change requests (SCR) and reflects real-world feedback on proposed functionality.

ITSM 2007 New Features

Holiday Calendar

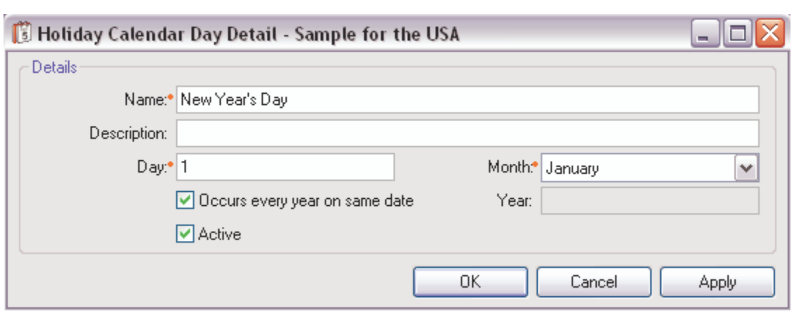
Purpose

Holiday calendars are used in Working Time Calendars. Within a Holiday Calendar you specify the none Working Days for your Working Time Calendar



Create a Holiday Calendar

Access to Holiday Calendars is done via the Manage-Holiday Calendars menu.



Via the Holidays tab of the Holiday Detail form, new Holidays can be added. For each Holiday you can define if it occurs every year.

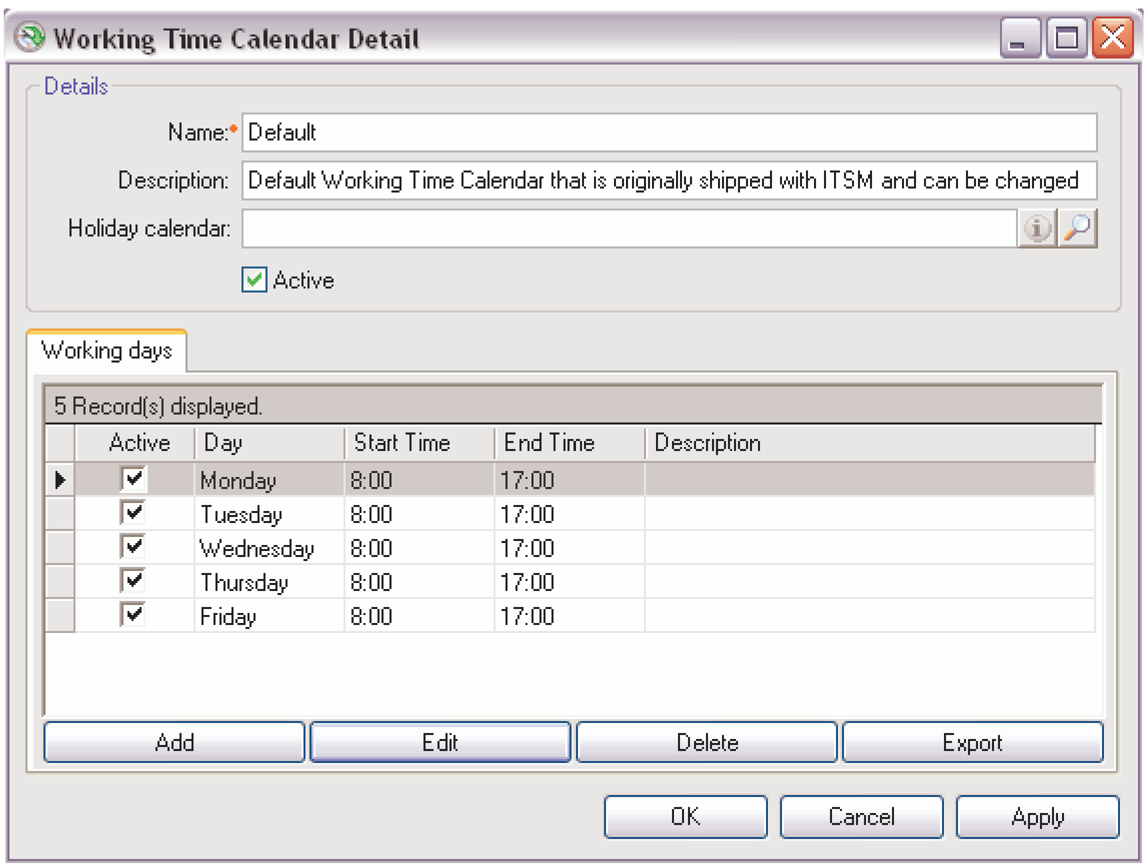
Working Time Calendar

Purpose

In earlier versions of ITSM, system options could be set to define the Working Time Calendar. In that case you were limited to use one Working Time Calendar. There are cases were you like to be able to define multiple Working Time Calendars. For example you could have different working hours depending on the service level. Critical issues need to be serviced 24/7 while for medium priority issues it’s sufficient to deliver service from Monday to Friday between 8 am and 5 pm. Also imagine a difference in working time for different departments.

Create a Working Time Calendar

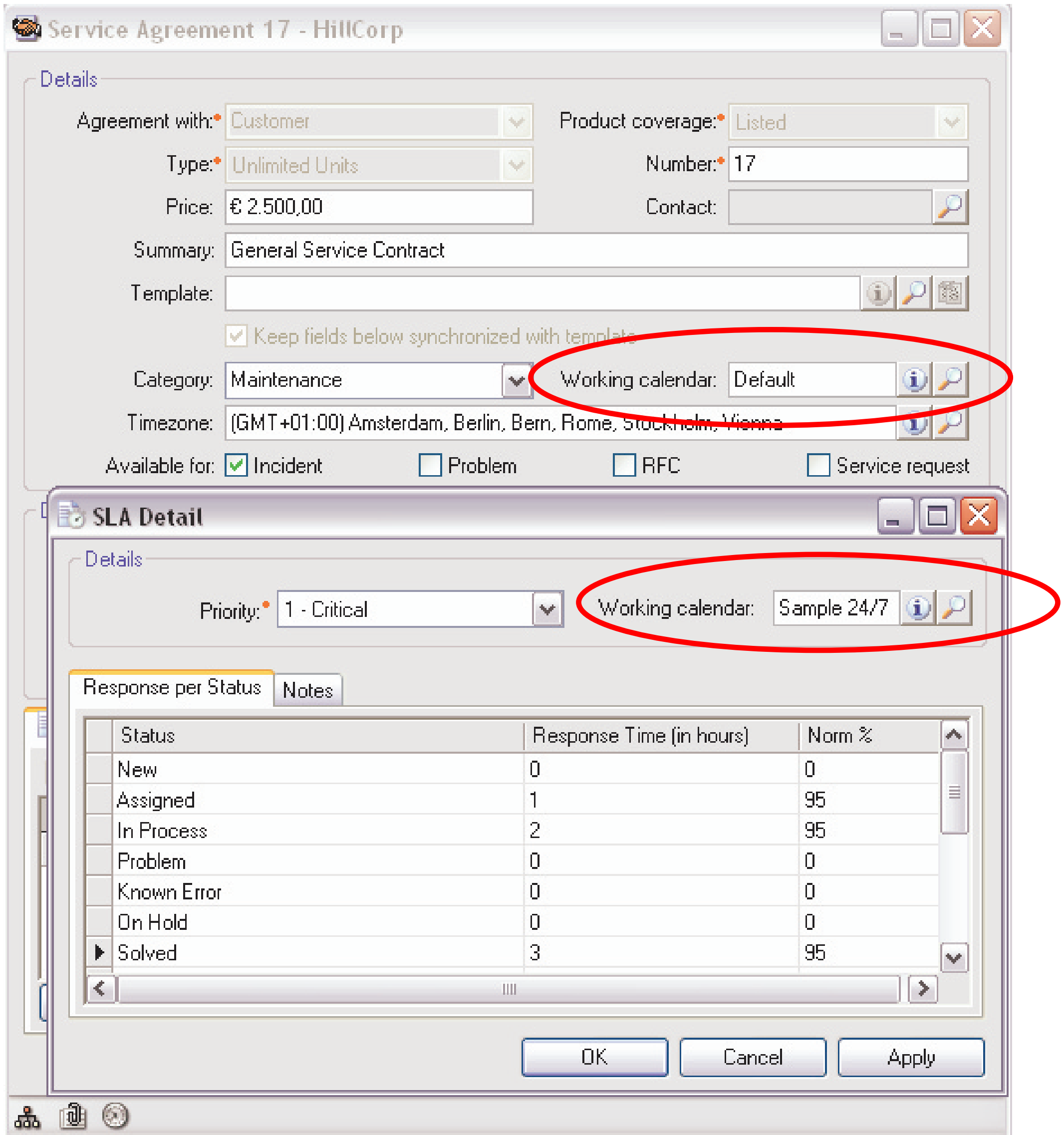
Working Time Calendars can be created by users with appropriate rights. Access to Working Time Calendars is done via the Manage-Working Time Calendars menu.



Within the Working Time Calendar Detail form you are able to relate a Holiday Calendar. Via the Working Days tab you are able to enter working days and specify the start and end time of a working day.

Using a Working Time Calendar

There is always one default Working Time Calendar, which is standard shipped with ITSM. The default Working Time Calendar is specified via the system options. If you use only one Working Time Calendar you can change the one that is shipped to your specific needs.



If you use multiple Working Time Calendars you are able to specify the Working Time Calendar in: Service Agreement templates; Service Level Agreements templates; Service Agreements and Service Level Agreements. When you add a new Service Agreement by default the SLA's will inherent the Working Time Calendar from the contract, but you are able to change them on SLA level.

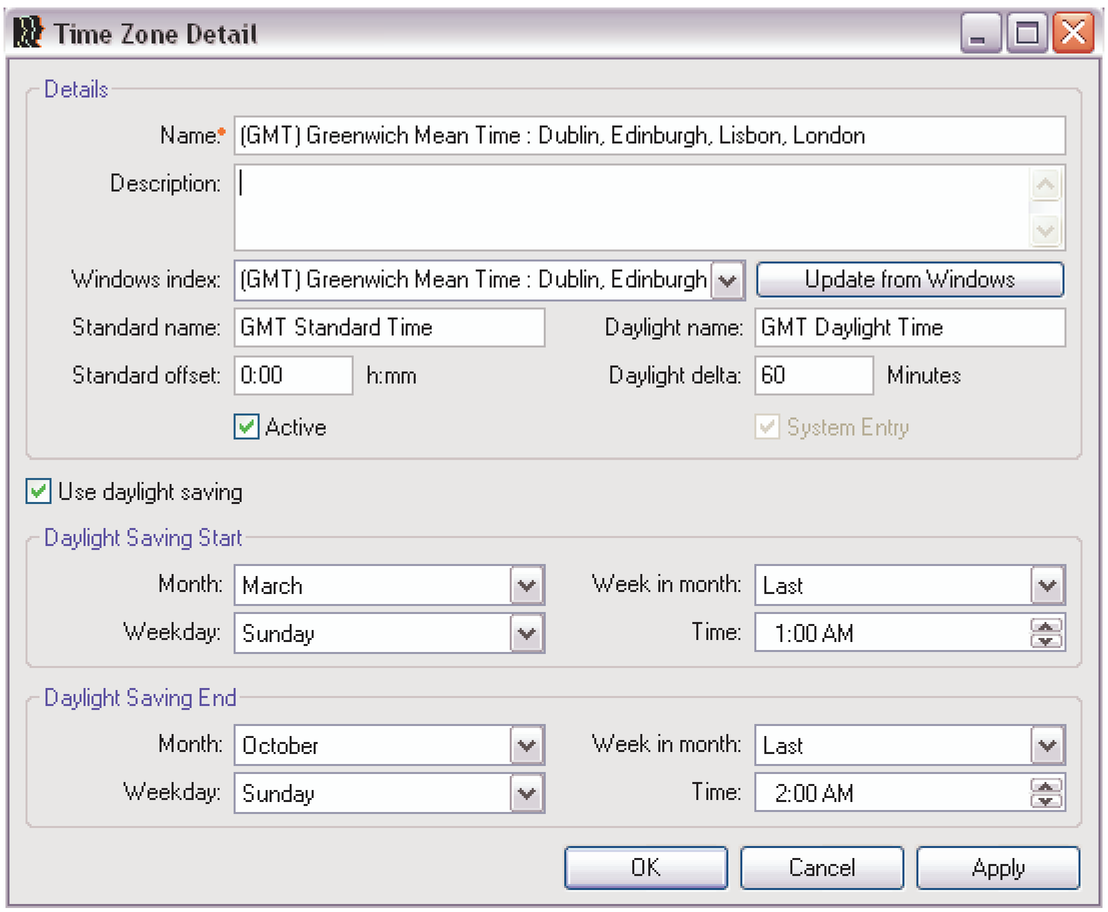
Time Zone support in SA and SLA

Purpose

Time zones are used to set the time zone for a Service Agreement. When an organization is using ITSM over multiple time zones and support is delivered over multiple time zones, this new feature is essential to calculate correct service times.

Create Time Zones

Access to the time zones is done via the Admin-Time Zones menu. Time zones can automatically be updated from Windows or added manually. On the Time Zone detail form you can update the details of the selected Time Zone from Windows or edit the details.



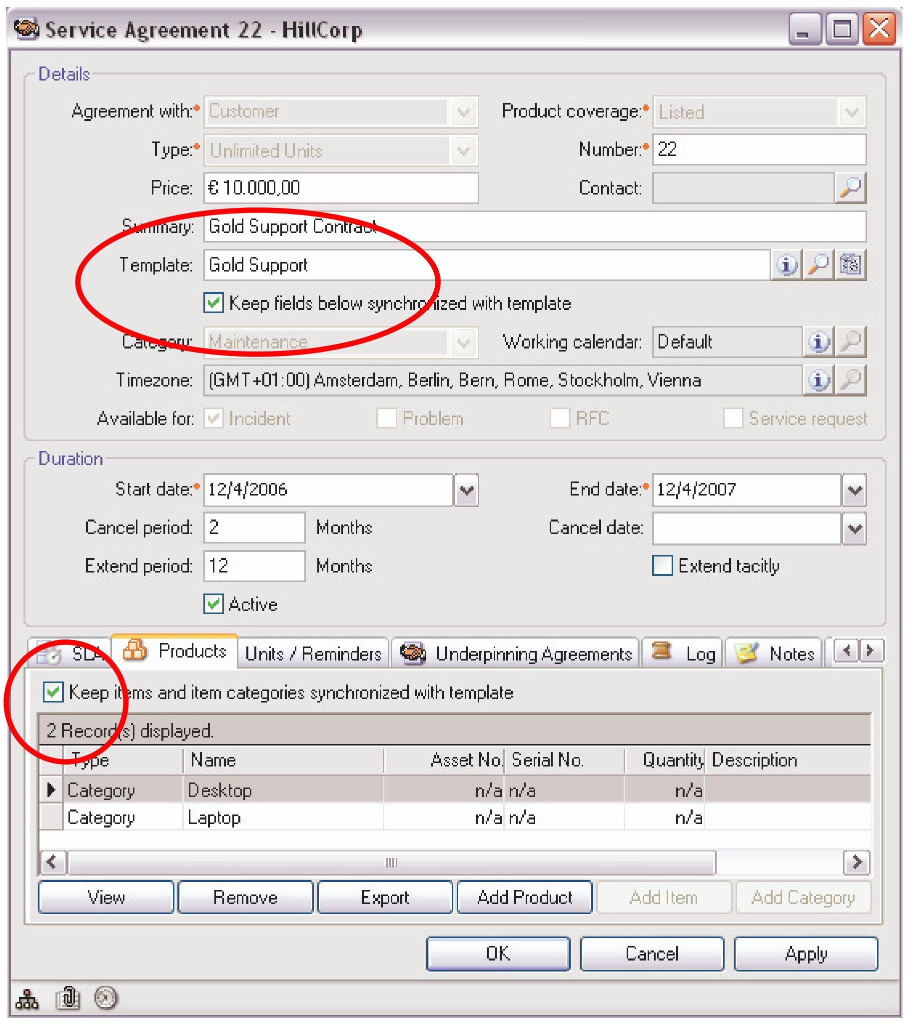
Service Agreement Templates

Purpose

The Service Agreement Templates give IT service organizations the possibility to define generic Service Agreements like Gold, Silver and Bronze templates which can be used for multiple organizations and departments. The templates can also be used to execute structured updates to Service Agreements related to the template.

Create a Service Agreement Template

Service Agreement Templates can be created by users with appropriate rights. Access to Service Agreement Templates is done via the Manage-Service Agreement Templates menu. The template contains al relevant Service Agreement information including the new functionality to use a specific Working Time Calendar, Time zone and coverage of Items and Item Categories.



Using a Service Agreement Template

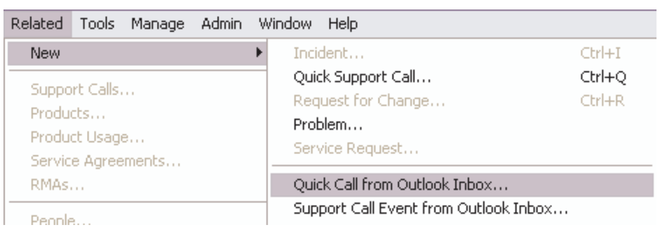
Service Agreements templates can be used when creating a new Service Agreement but also for existing Service Agreements to update them with the template settings. When a template is selected, different areas can be kept in sync with the template. Per area you can decide if you like to keep the contract in sync via the “Keep synchronized with template” checkbox.

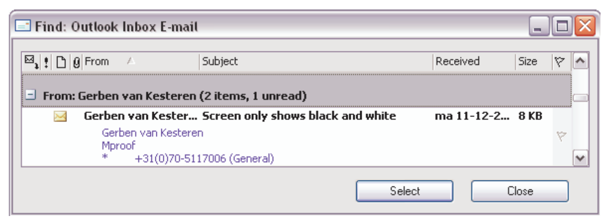
Coverage of Item and Item Category in SA

With the Service Agreement templates, the Service Agreement Product is adjusted to support coverage of items and item categories. Meaning it’s now possible to define contracts on model level (Item) and category level (Item category).

Create new support call via MS Outlook Inbox

A new menu item is added to create a new support call based on an e-mail in your MS Outlook Inbox. When the e-mail is selected, the quick call form will open so you are able to edit the call before you save it in ITSM. The other menu item makes it possible to add a new event to an existing support call based on an e-mail.





Support Call History Form

The support call history tab of the support call detail form has been replaced by a separate support call history detail form. The support call history form can be opened via the history button. 

Support Call Owner

Purpose

The call owner is introduced so owners of support calls can keep track of the calls they are responsible for, while they are assigned to others users or queues.

Using Call Owner

The call owner is set when a new call is created. The default value is the first user. The My Support Call form is extended so owners can search for all their calls. Within RFC's the owner has a more specific role.

On Hold Functionality

Purpose

In service environments, service level agreements are used to measure the performance of the service provider. In some situations, the service provider is not able to deliver its service because of external factors. For example the customer needs to specify more information before the service provider can continue the process. In these types of situations an on hold function is needed to "freeze" the available service time and take the on hold period into account when measuring SLA performance.

Using On Hold

The on hold functionality is available on the support call detail form. When the on hold is set to true, ITSM will ask for a reason. The information is stored in the on hold history and is used in service performance reporting.

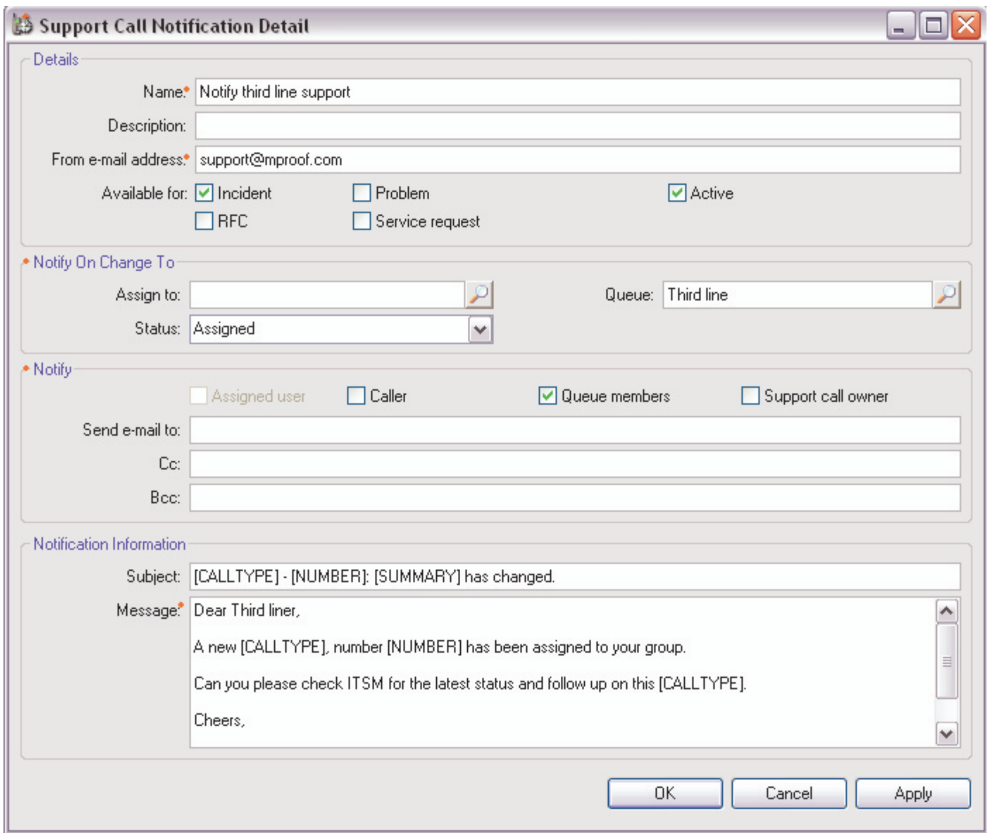
Support Call Notification

Purpose

Besides call escalation, the agent tasks are extended to support call notification triggers. The purpose of Support Call notification is to inform parties related to calls about a status or assignment change. For example a third line support team can be notified when a call is assigned to them.

Create a Support Call Notification

Support Call notifications can be created by users with appropriate rights. Access to Support Call notification is done via the Manage-Support Call-Notification menu.



Notifications can be set for the various call types. Within the Notify On Change To area, the value can be set to trigger the notification. Via notification, the assigned user, caller, queue members and the owner of the call can be informed. Besides these related parties, separate e-mail addresses can be specified in the To, CC and BCC. Via the e-mail notification agent task, the notifications can be scheduled to be send.

Auto refresh Find Support Call forms

Purpose

The Find Support Call forms are extended with two new features. The auto refresh and the read/unread functionality. The combination of these two makes it easier to keep track of the changes and monitor open calls

Using Auto refresh

Via a system option the use of auto refresh for the Find Support Call forms can be activated. Each ITSM user can set per form if he likes to use the auto refresh or not.

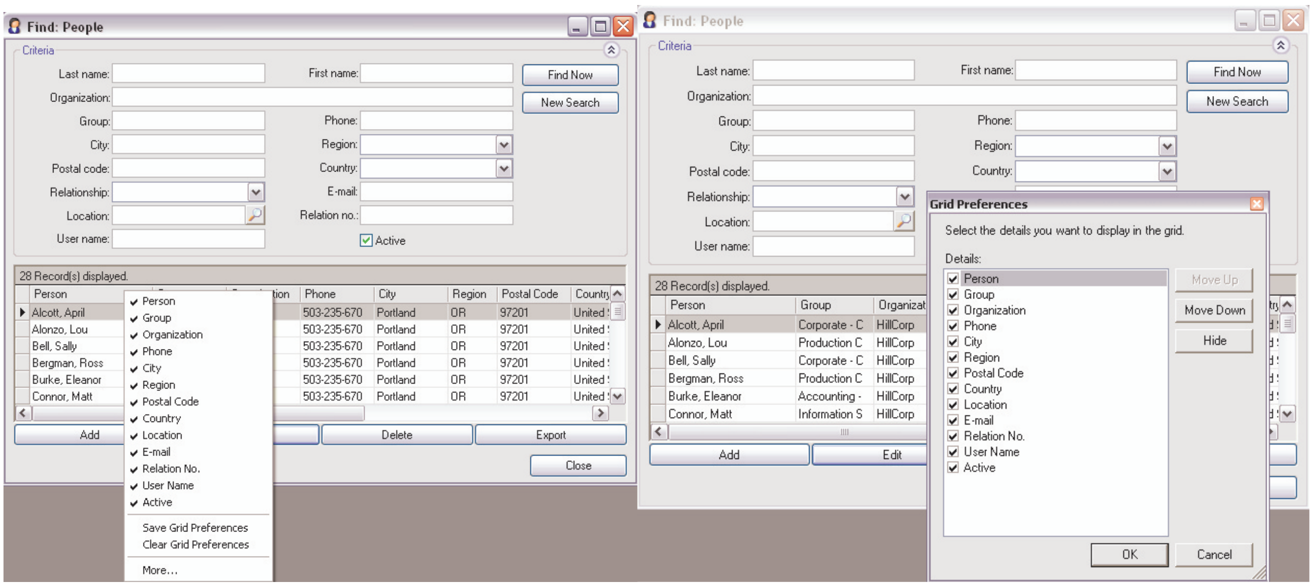
4 Record(s) displayed.

Read	Type	Number	Summary	Time Left	Assigned To	Status	Owner	Person
✔	Incident	19	No Internet Access	-45:09	System Manage	In Process	Demo, User	O'Dell, Jack
✔	Incident	17	No Internet Access	-18:13	System Manage	In Process	Demo, User	Gardner, Sue
	Incident	13	**Problem installing software client**	8:19	Service Desk	Assigned	Demo, User	McNeil, Paul
	Incident	16	**Employee lost password**	32:54	Service Desk	Assigned	Demo, User	Till, Lucy

Within the grid, records are displayed bold when they are unread. When a users reads a record the system will automatically set the record to read and display the summary none bold but the user can also manually set a record to read or unread. When the record is changed by someone else, the record will be set to unread again. So it’s easy to monitor changes of calls. To be able to sort and search on read/unread an extra column is added to the grid.

User Grid Preferences

The user grid preferences functionality is shipped with ITSM 2007. For ITSM 8.4 this feature was released as a patch. This new feature makes it possible to set user preferences for every grid in the application. The user can change the columns that are displayed, change the column order and clear the preferences.



RFC Enhancements

Purpose

The RFC functionality within ITSM 2007 is enhanced to provide more support for the role based security per RFC state.

RFC states

In general a distinction is made for the following states:

RFC state	Description
Creation	In this state the RFC is being created
Preparation	In this state the RFC is being prepared for the CAB. In order for CAB to make a proper judgment, information is collected and stored in the RFC
Decision	I this state, the CAB members are invited to commit their judgment. This state is finished when the final judgment is done.
Implementation	In this state the final decision is done and no changes can be made without withdraw the final decision. The planned change is executed according to plan.
Closed	In this state the complete RFC process is finished and the RFC is closed

RFC roles

Within the named states the players involved in the change process can have the following roles:

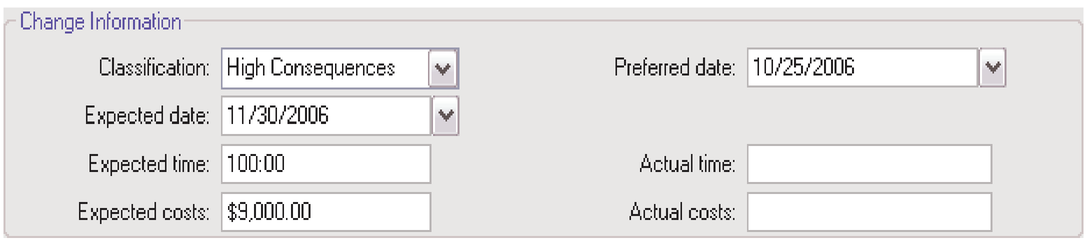
Role	Description
Creator	The user that creates the RFC
Owner	The user that keeps track on the progress of the RFC and is responsible for the RFC.
Cab member	The user that is able to give his or here judgment about the RFC
Assigned user	The user or queue that is assigned to the RFC to execute certain tasks
Supervisor	The user that is overall responsible for all RFC’s

RFC final decision

When all CAB members have done their judgment, the RFC owner or RFC supervisor can give a final decision and overrule the decision of the CAB members. Besides the final decision it's possible to configure ITSM so the owner can do a judgment for one of the CAB members.

RFC additional fields

The RFC specific fields are extended with additional fields to store more information.



Security Group enhancements

The security within ITSM 2007 is extended with additional security groups. Four original groups are now obsolete: Call Management, Call Representative, Service Management en Configuration Management.

The following groups were added:

Security Group	Description
Answerbook Managers	Maintain the answerbooks and answerbook pages. This includes the approval of answerbook pages for internal and external use.
Change Advisory Board	Users involved in the approval process of request for changes
Change Managers	Users managing the change process, the change supervisors. This includes maintaining templates, call categories, statuses, escalation and notification tasks
Configuration Managers	Users involved in the configuration management process. Maintaining products and items and all that is related to the maintenance of these entities.
Incident managers	Users managing the Incident process, this includes maintaining templates, call categories, statuses, escalation and notification tasks
Problem Managers	Users involved in the problem management process. Defining problems based on input from other processes, manage problems and know errors. This group is also able to add new answerbook pages, but not able to approve them.
Service Desk Engineers	Users executing service desk tasks. Intake and follow up of incidents, service request and requests for changes. This group is also able to add new answerbook pages, but not able to approve them.
Service Level Management	Users involved in defining contracts and service levels for organizations, groups and persons.
Service Level Managers	Users managing the service level management process. This includes maintaining Service Agreement templates, Working Time Calendars and holiday calendars.

Other functional changes

Multiple software changes have been made with this release:

- CAB judgment audit trail
- Configurable from e-mail address when e-mail is sent
- Configurable reply e-mail address when e-mail is sent
- Enhanced service time calculation
- Extra attribute to identify a problem as know error
- Extra attribute to specify an event type
- Extra attributes to specify call type of a service contract
- Import of invoices
- Import of item categories
- Import of Service contacts based on Service Agreement templates
- Send HTML formatted e-mail from an answerbook page
- Separate right for close call
- Separate right to re-open a call
- Separate right for incidents
- Separate right for the Supplier tab on a support call
- Separate right for a RFC supervisor

Additional information

Please contact Mproof for more information

www.mproof.com
+31 70 5117006

About Clientele ITSM

Clientele ITSM is very extensive, *out of the box* software for service management, including providing support for the most important IT processes formulated in ITIL. It allows organizations to offer timely and professional IT services with a high level of personal detail, and the detailed management of incidents, problems, changes and configurations at the desired service level.
Clientele software is built around Microsoft .NET, is completely web based and especially suited for use in combination with SQL Server. Clientele ITSM has received ITIL certification from Pink Elephant for the most important service management components. For more information, please visit www.clientele-itsm.com

About Mproof

Mproof is an Independent Software Vendor (ISV) based in the Netherlands and established in 1997. Mproof develops Clientele software for IT service management, customer support and self-service, and has sales partners and customers worldwide. On an international level, Mproof cooperates closely with Epicor for product development, sales, implementation and support. Epicor markets the Mproof product Clientele ITSM as Epicor ITSM through its own partner channel. Mproof is a certified Microsoft partner. For more information, please visit www.mproof.com