

## ITSM 2007 Release guide Clientele / Epicor ITSM

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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

選 Ho	liday Ca	lendar Detail										
Deta	ails											
	Name:* Sample for the USA											
	Description: Common holidays for the United States. Please note that only the most common holidays are activ											
	✓ Active											
Holic	-	king Time Calendars										
48	Record(s) Active	displayed.	Date	Description								
				Description								
	<b>V</b>	New Year's Day	January 01 (every year)	≡								
		Martin Luther King Day	Monday, January 16, 2006									
		President's Day	Monday, February 20, 2006									
	<b>V</b>	Memorial Day	Monday, May 29, 2006									
	<b>~</b>	Independence Day	July 04 (every year)									
	<b>V</b>	Labor Day	Monday, September 04, 2006									
		Columbus Day	Monday, October 09, 2006									
		Veteran's Day	November 11 (every year)									
	<b>V</b>	Thanksgiving Day	Thursday, November 23, 2006									
		Christmas Eve	December 24 (every year)	~								
<												
	Ad	bb	Edit Delete	Export								
			OK	Cancel Apply								

### Create a Holiday Calendar

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

🔞 Holiday Calenda	ar Day Detail - Sample for the U	SA		_ 🗆 🔀
Details				
Name:*	New Year's Day			
Description:				
Day:*	1	Month.*	January	~
	Occurs every year on same date	Year:		
	Active			
		ок	Cancel	Apply

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.

🛞 W	orking Ti	ime Calenda	ar Detail									
CDel	Details											
	Name:* Default											
Description: Default Working Time Calendar that is originally shipped with ITSM and can be change												
ŀ	Holiday cale	ndar:				٩						
		🗹 Activ	e									
		- Activ	с									
Wo	orking days											
5	Record(s) di	isplaued										
	Active	Day	Start Time	End Time	Description							
►	<b>V</b>	Monday	8:00	17:00								
	<b>v</b>	Tuesday	8:00	17:00								
	✓	Wednesday	8:00	17:00								
	✓	Thursday	8:00	17:00								
	<b>~</b>	Friday	8:00	17:00								
	Add Edit Delete Export											
					OK Cancel	Apply						

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.

Agreement with:	Customer	~	Product coverage:*	Listed	~
Type:	Unlimited Units	~	Number:*	17	
Price:	€ 2.500,00		Contact:		
	General Service	Contract			
Template:					1)
r empiate.	Keep fields be	elow synchronized w	ith template		
Category:	Maintenance	~	Working calendar:	Default	•
		utudan Dala Da	n, Rome, Stockholm, )		
limezone:	105MT+00100Am	nsrerdam kerlin ker			
					Service reques
Available for: SLA Detail Details		Problem	Working calend	2	Service reques
Available for: SLA Detail Details	✓ Incident iority:* 1 - Critical	Problem	RFC	2	
Available for: SLA Detail Details Pr	✓ Incident iority:* 1 - Critical	Problem	RFC	dar: Sample	24/7
Available for: SLA Detail Details Pr Response per S Status New	✓ Incident iority:* 1 - Critical	Problem	BFC      Working calend  Response Time (in hou	dar: Sample	24/7 i
Available for: SLA Detail Details Pr Response per S Status New Assigned	✓ Incident iority:* 1 - Critical	Problem	RFC      Working calend Response Time (in hou	dar: Sample	24/7
Available for: SLA Detail Details Pr Response per S Status New Assigned In Process	✓ Incident iority:* 1 - Critical	Problem	RFC	dar: Sample rs) Norr 0 95 95	24/7 i
Available for: SLA Detail Details Pr Response per S Status New Assigned	✓ Incident iority: • 1 - Critical tatus Notes	Problem	RFC	dar: Sample	24/7 i
Available for: SLA Detail Details Pr Response per S Status New Assigned In Process Problem	✓ Incident iority: • 1 - Critical tatus Notes	Problem	RFC	dar: Sample rs) Norr 0 95 95 0	24/7 i
Available for: SLA Detail Details Problem Assigned In Process Problem Known Erro	✓ Incident iority: • 1 - Critical tatus Notes	Problem	RFC	dar: Sample (rs) Nor 95 95 0 0	24/7 i

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.

👷 Time Zone Deta	ail		_							
Details										
Name.*	GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London									
Description:				•						
				<u>v</u>						
Windows index:	(GMT) Greenwich Mean Time :	Dublin, Edinburgh 🔽	Update from Windo	ws						
Standard name:	GMT Standard Time	Daylight name:	GMT Daylight Time							
Standard offset:	0:00 h:mm	Daylight delta:	60 Minutes							
	Active		System Entry							
Use daylight saving	g									
Daylight Saving Sta	ıt —									
Month:	March 🗸	Week in month:	Last	<b>v</b>						
Weekday:	Sunday 💌	] Time:	1:00 AM							
- Daylight Saving End	1									
Month:	October 🗸	Week in month:	Last	~						
Weekday:	Sunday 🗸	] Time:	2:00 AM							
		ОК	Cancel A	oply						

### 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.

Service Agreem	ent 22 - HillCorp				
Details					
Agreement with:	Customer	×	Product coverage	• Listed	~
Type:*	Unlimited Units	×	Number	:• 22	
Price:	€ 10.000,00		Contact	:	$\sim$
Summary:	Gold Support Contract				
Template:	Gold Support				1) 🔎 🛍
	Keep fields below sy	nchronized wit	th template		
Lategory	Maintenance		Working calendar	: Default	i) 🔎
Timezone:	(GMT+01:00) Amsterda	am, Berlin, Berr	n, Rome, Stockholm	, Vienna	<b>i</b> ) 🔎
Available for:	Incident [	Problem	RFC		Service reques
Duration					
Start date:•	12/4/2006	~	End date	• 12/4/2007	~
Cancel period:	2 Months		~		
Extend period:	12 Months			Extend	tacitly
	Active				
SIN 🔠 Produ	ucts Units / Berninders	🔊 🖾 Underr	pinning Agreements		🔧 Notes 💽
<u> </u>	em categories synchron			Log	
2 Record(s) displaye		200 With tempi	dic		
	lame	Asset N	lo, Serial No.	Quantity De:	scription
	esktop		/a n/a	n/a	
Category L	aptop	n/	/a n/a	n/a	
<					>
View	Remove Ex	port A	dd Product 🛛 🗸 🖉	\dd Item	Add Category
					A 1-
			ОК 🛛 С	ancel	Apply

#### 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.

ated Tools Manage Admir	n Window Help			
New	Incident	Ctrl+I		
Support Calls Products	Quick Support Call Request for Change	Ctrl+Q Ctrl+R	Find: Outlook Inbox E-mail	_
Product Usage Service Agreements	Problem Service Request		Image: Subject     Rece       Image: From: Gerben van Kesteren (2 items, 1 unread)	ived Size
RMAs	Quick Call from Outlook Inbox			l 1-12-2 8 KB
People	Support Call Event from Outlook Int	юх	Gerben van Kesteren Mproof * +31(0)70-5117006 (General)	
			Select	Close

## 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.  $\Im$ 

## 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.

🍰 Support Call Noti	ification Detail	
Details		
Name.*	Notify third line support	
Description:	κ	
From e-mail address.*	support@mproof.com	
Available for:	r: 🗸 Incident 📃 Problem 🗸 Active	
	RFC Service request	
• Notify On Change To-		
Assign to:	Queue: Third line	$\left  \right\rangle$
Status:	Assigned	
• Notify		
	Assigned user Caller Queue members Support call owner	
Send e-mail to:		
Cc:		
Bcc:		
<ul> <li>Notification Information</li> </ul>	n	
Subject:	[CALLTYPE] - [NUMBER]: [SUMMARY] has changed.	
Message.	Dear Third liner,	
	A new [CALLTYPE], number [NUMBER] has been assigned to your group.	
	Can you please check ITSM for the latest status and follow up on this [CALLTYPE].	=
	Cheers,	~
	OK Cancel Apply	

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	4 Record(s) displayed.												
	Read	Туре	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				
	<b>V</b>	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.

🚦 Find: People							_ 0 2	8	Find: People						
Criteria							*		Criteria						-
Last name:			First name:			Fi	nd Now		Last name:			First name:		Find Now	
Organization:						Ne	w Search		Organization:					New Search	
Group:			Phone:						Group:			Phone:			_
City:			Region:			~			City:			Region:	~	1	
Postal code:			Country:			~			Postal code:			Country:	~		
Relationship:	~		E-mail:						Relationship:		~	Grid Preferences			
Location:	$\mathcal{P}$		Relation no.:						Location:						i l
User name:				Active					User name:			Select the details you wa	nt to display in the gri	d.	
												Details:			
28 Record(s) displaye Person			Phone	City		Postal Code			28 Record(s) displayed	ł.		✓ Person		Move Up	
<ul> <li>Alcott, April</li> </ul>	✓ Person	tion	503-235-670	Portland	Region	97201	Country A		Person	Group	Organiza	Group     Group     Organization		Move Down	try.▲
Alonzo, Lou	✓ Group	-	503-235-670	Portland	OR	97201	United !		Alcott, April	Corporate - C	HillCorp	Phone			d : 🗉
Bell, Sally	<ul> <li>Organization</li> <li>Phone</li> </ul>	E	503-235-670	Portland	OR	97201	United :		Alonzo, Lou	Production C	HillCorp	🗹 City		Hide	81
Bergman, Ross	✓ City		503-235-670	Portland	OR	97201	United :		Bell, Sally	Corporate - C	HillCorp	Region			81
Burke, Eleanor	✓ Region		503-235-670	Portland	OR	97201	United :		Bergman, Ross	Production C	HillCorp	<ul> <li>Postal Code</li> <li>Country</li> </ul>			<b>H</b> :
Connor, Matt	✓ Postal Code		503-235-670	Portland	OR	97201	United 🔽		Burke, Eleanor	Accounting -	HillCorp	✓ Location			11
<	✓ Country						>		Connor, Matt	Information S	HillCorp	E-mail			1.~
Add	✓ Location			Delete		Expo	tro		<	1111		Relation No.			
	✓ E-mail					_			Add		Edit	User Name			
	✓ Relation No.						Close					<ul> <li>Active</li> </ul>			
	🖌 User Name														
	✓ Active										_				
	Save Grid Preferences Clear Grid Preferences														
	More												OK	Cancel	

## **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.

Final Decision					
Final decision:	O Undecided	<ul> <li>Approved</li> </ul>		○ Refused	
Decision date:	8-12-2006	~	Reason.•	All CAB approved	~

### **RFC** additional fields

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

Change Information					
Classification:	High Consequences	~	Preferred date:	10/25/2006	~
Expected date:	11/30/2006	Y			
Expected time:	100:00		Actual time:		]
Expected costs:	\$9,000.00		Actual costs:		]

# **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

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#### 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 <u>www.clientele-itsm.com</u>

#### 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