Clientele® ITSM

2008 Release guide

Disclaimer

Contents

Introducing ITSM version 2008

Introduction

For 10 years Mproof customers have come to expect valuable enhancements to the product suites on a regular basis. Release 2008 is no exception, delivering new features that offer more configurability and functional capabilities for your business.

ITSM 2008 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 2008. 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 2008 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 2008 of ITSM. Here are the objectives and how we've accomplished them:

Objective	**Achievement**
Business extensibility	The service-oriented architecture (SOA) that the Clientele framework is built upon has been used to provide easier extension of Clientele to external applications and businesses. This includes an API for computer telephony integration (CTI); in-bound and out-bound Web service integration via Epicor Service Connect and the introduction of a Self-Service and Field-Service Content pack based on Microsoft SharePoint Portal 2007 technologies
Extension of the current product management/CMDB functionality with a purchase order module	A feature desired by many IT organizations to track purchase orders and easily generate new IT assets into the CMDB.
Enhancements to existing user experience and application	There are a variety of enhancements to the user interface and core feature set that will improve user experience and enhance usability of Clientele ITSM.
Upgrade from 8.2.1, 8.4, 2007.	Version 2008 provides database upgrade tools from 8.2.1, 8.4 and 2007.
Deliver high priority customer requested enhancements	Version 2008 incorporates the results of customer software change requests (SCR) and reflects real-world feedback on proposed functionality.

ITSM 2008 New Features

Business Extensibility

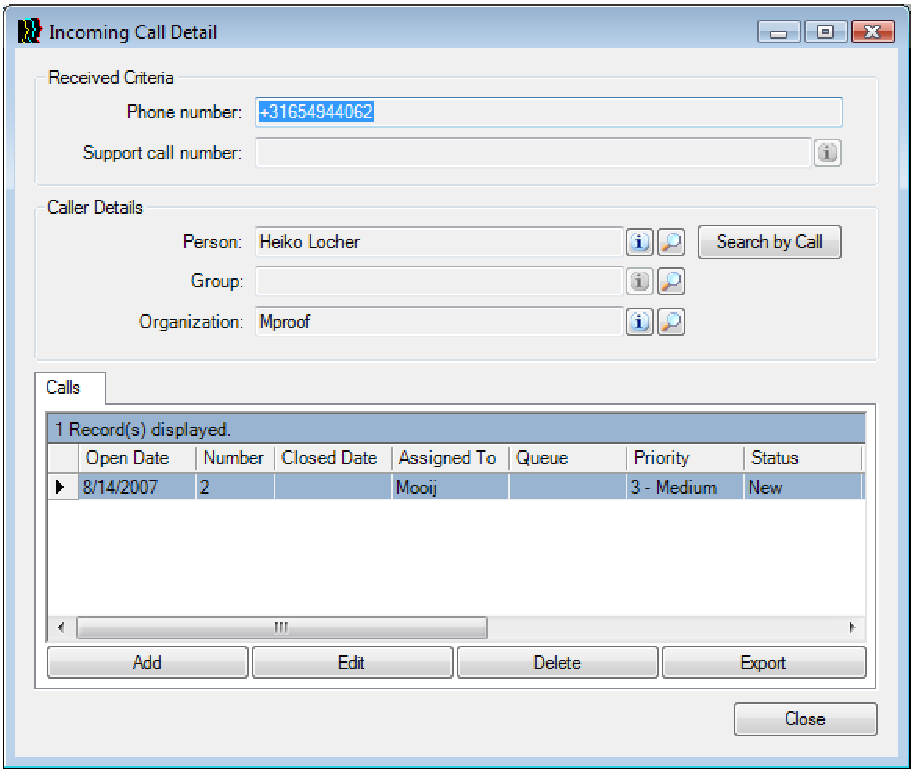
Clientele ITSM is built using a service-oriented architecture (SOA) based on Microsoft.NET and Web services. This SOA approach provides easier extension of Clientele to external applications and businesses.

Computer Telephony Integration

Computer telephone integration (CTI) opportunities have been improved with an interface that has been exposed to allow telephone software (through some custom programming) to call to launch a new Clientele form "Incoming Call Detail." From this form, which is automatically started by an incoming call, users can:

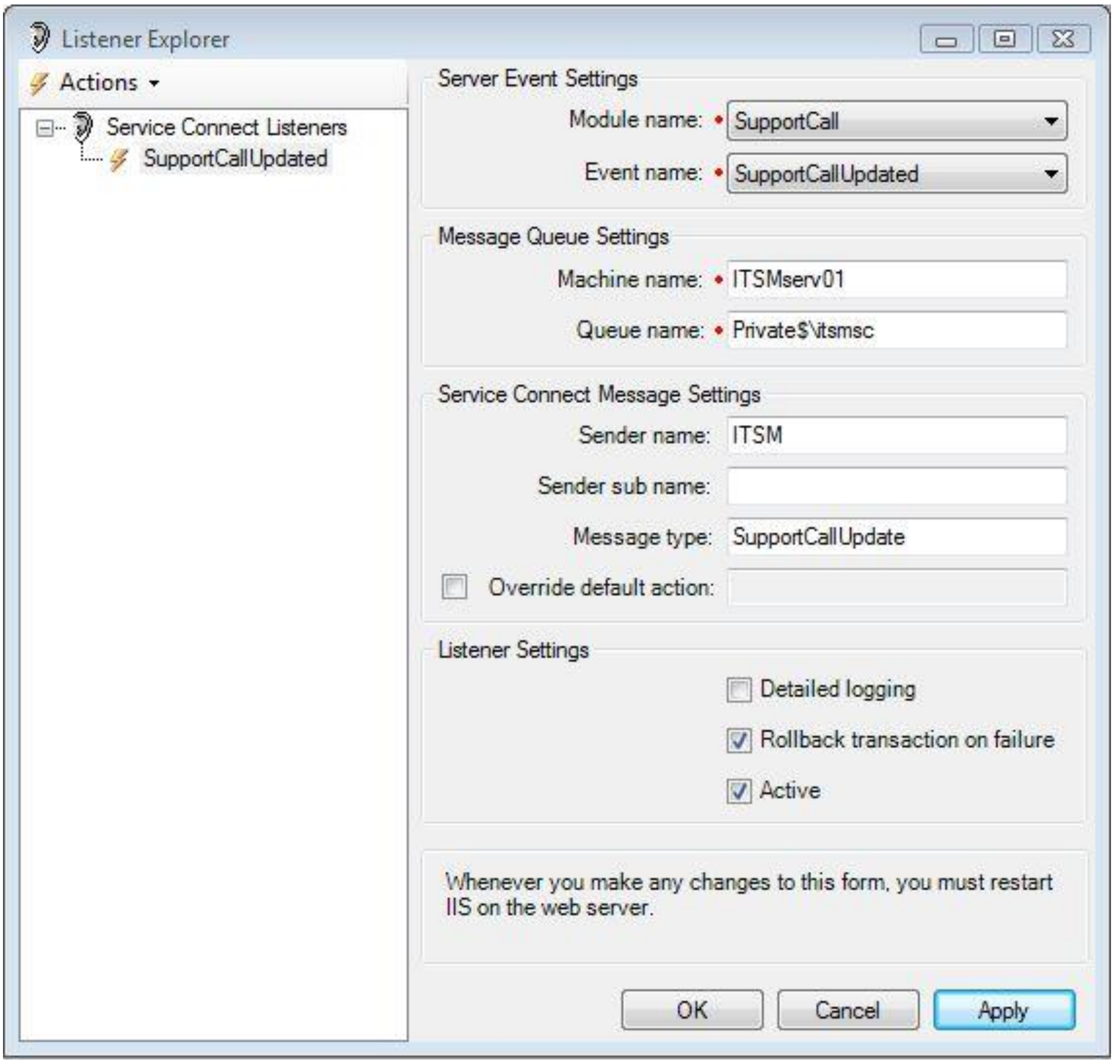
- Look up person and organization information from the incoming number. If the number is listed under more than one record, a message displays.
- Link unrecognized phone numbers to current records or creating new records for the incoming number
  as appropriate.
- Open directly an open support call associated with the incoming number, adding a new support call or editing a different support call.

This new feature can significantly reduce the costs associated with integrating with external CTI hardware and software.



Epicor Service Connect

Epicor Service Connect is a business integration platform, functioning as a central integration point for secure workflow orchestrations within Epicor applications as well as external connectivity to Epicor and non-Epicor applications. Users can automate tasks and processes within the application to promote continuous performance initiatives and service and support quality within the organization or across the value-chain. Service Connect lets employees focus on value added activities and management by exception instead of repetitive data (re)entry tasks.
Built to support collaborative processes, Service Connect links different business entities, applications or users using open, industry wide standards and technology that enables businesses to deploy solutions — confident that their investment will remain in tact for the future. Service Connect harnesses the openness of XML and includes service-bus functionality for Security, Messaging, Orchestration, Transformation, Scheduling, Notification, and Exception Handling to deliver rock-solid reliability combined with ease of use.
For outgoing integrations, administrators can set up Server Event Listeners which wait for a specified event to occur (for example, an order is updated) and then send the data set of the transaction (the updated order) to a Service Connect workflow. For incoming integrations, several Clientele Web services have been enhanced to allow easier interaction with Service Connect.



The following Clientele ITSM entities have been enhanced for use with Epicor Service Connect:

- Party/Customer
- Items
- Orders
- Products (Registration)
- RMA
- Service Agreements
- Quotes
- Opportunities
- Leads
- Support Call

Two Service Connect examples have been added to the software development kit (SDK) walkthroughs to help demonstrate the capabilities of interface.

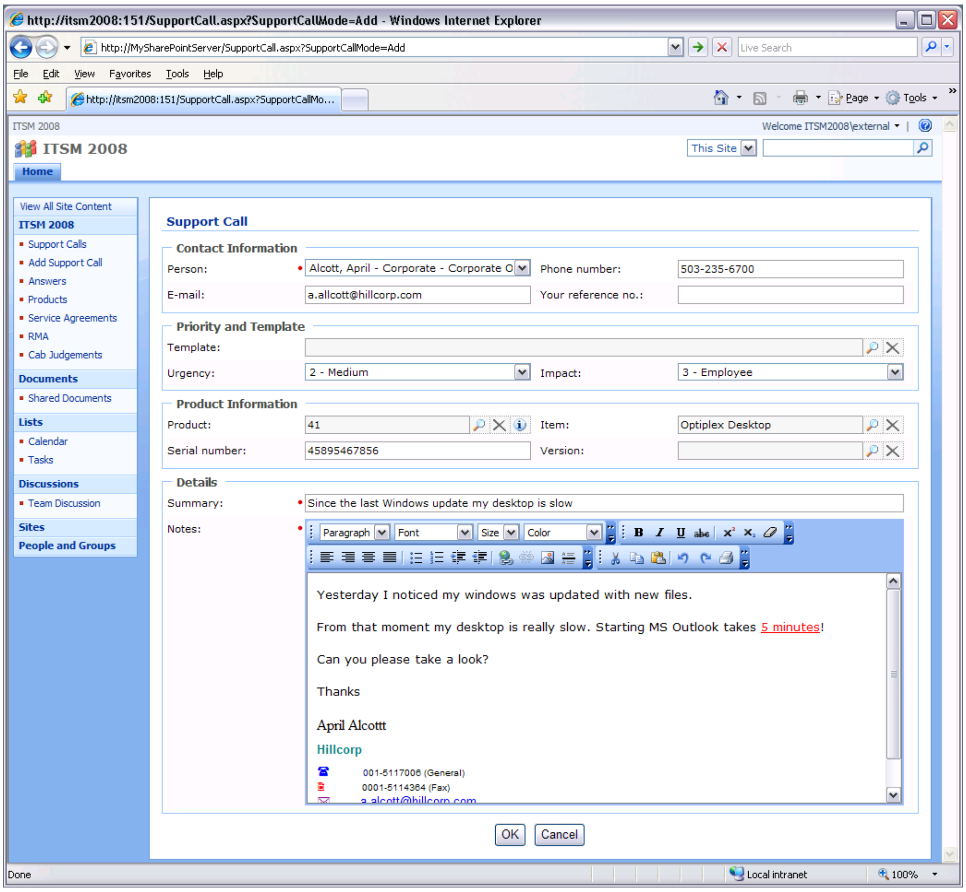
Service Connect uses XML documents to provide simple Web service connectivity to Epicor solutions and other applications that support XML standards. Integration can be easily built by using the Service Connect Visual Data Mapping tool to link and transform XML documents to map to different systems along multiple communication channels and protocols to support a wide range of integration scenarios.

With this new mechanism it will be far easier to create and maintain data integrations to Clientele and support workflows based on system events.

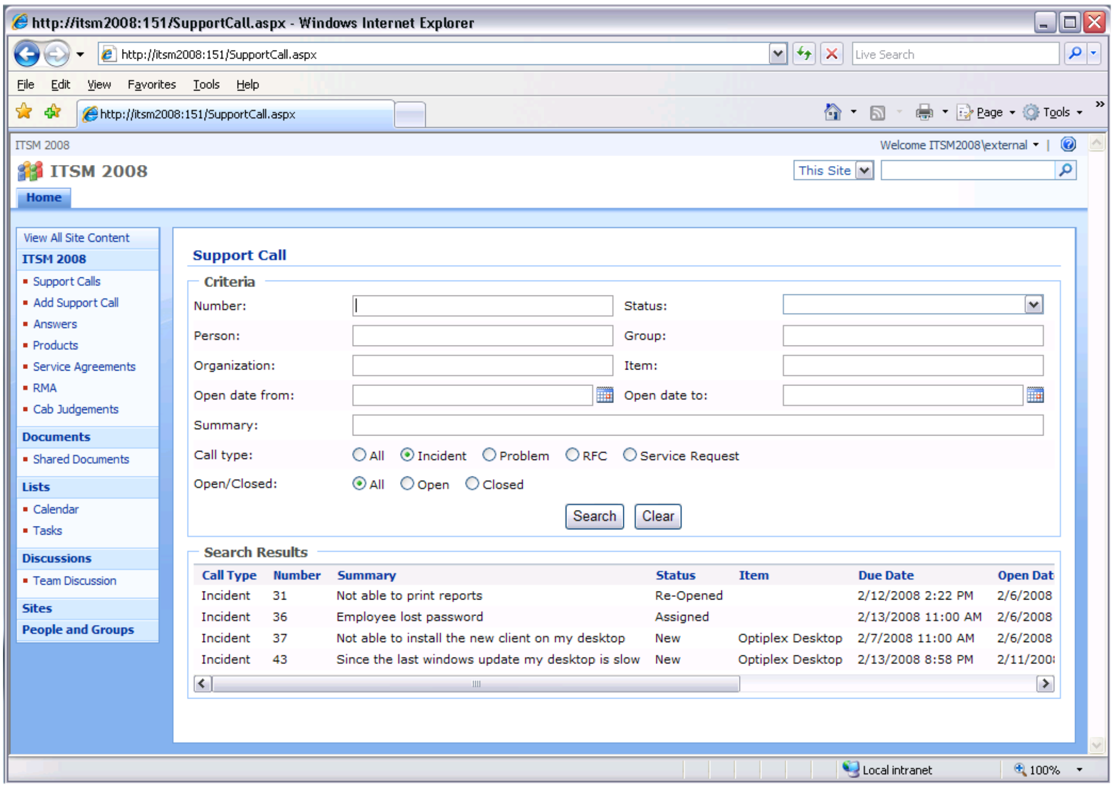
Epicor Service Connect runtime is available as part of the Clientele ITSM SDK. The Full Edition of Service Connect is available for purchase separately. Complete details on Epicor Service Connect versions are available via your Account Manager or authorized Mproof Partner.

Self-Service and Field-Service via MS SharePoint

This release of Clientele ITSM sees the introduction of a new Self-Service and Field Service Content Pack for Microsoft® SharePoint® 2007 product and technologies, which may also be extended using the inherent capabilities of Microsoft® SharePoint®. It replaces the Self Service Portal which was available for the earlier releases of ITSM 8.2.1, 8.4 and 2007.



The new Self service content pack offers consistence functionality to the prior Self service portal and even provides more than that. The user experience is improved and updated to the newest standard. Portal users can now use call templates made available to them for easy call registration. Attachments can be uploaded and viewed. There is support for a key user role.



The key-user role differs from the regular user and can create new service request, incidents and RFC's on behave of other users. This role is desired in situations where not all end users/ customers have direct access to the Portal and key users are appointed to perform this task.

The portal user management is also improved for this version. It's now easy to automatically generate portal user accounts and use integrated logon. Also certain entities can be set to be not visible for external. For example support call events can be flagged so they are not visible for end users/ customers.

Besides Self Service, the SharePoint based portal has a new function in providing an extension for Clientele ITSM users in the Field requiring easy access to the key functions of ITSM. Via the ITSM Portal, IT support staff in the field have easy but secured access to adjust incidents, service request, RFC's, check for new assignments, finalize change advisory board judgments and find information.

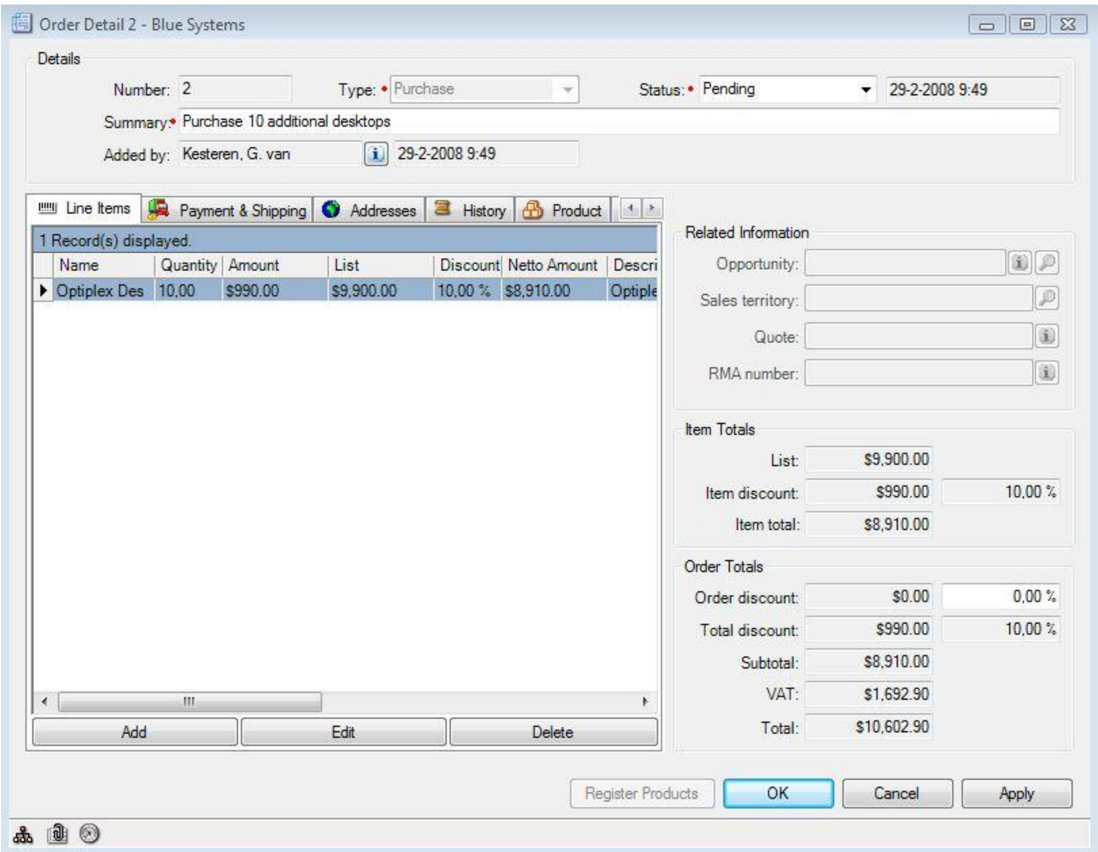
Clientele ITSM Portal is available for separate purchase. Contact your Account Manager or Authorized Mproof Partner for details or to discuss upgrade and migration options.

Orders Functionality

Sales and Replacement Orders

Orders are a commitment from your organization to deliver specific items to a customer. An order may consist of a single item, multiples of an item and/or several different items. Information tracked for ordered items includes item part numbers, quantities and pricing. Information from quotes or opportunities can be used to automatically create sales orders. Orders can also be started from an RMA form to provide replacement items. Depending on your role (sales or customer support), you may interact with orders differently. Sales users create sales orders, while customer support users create replacement orders in conjunction with RMAs. Orders have a process cycle that is tracked on the order forms. This process allows a user to review pending orders and then mark them as ready to process. Orders that are ready to process can be processed. A set of reports can be run (the admin configures the set) to do lightweight fulfillment (you'll need to create your own Pick List or Invoice or Bill of Material reports).

From the Quote Detail form – press the Order icon in the status bar at the bottom. Doing so will generate an Order using the data on the quote.

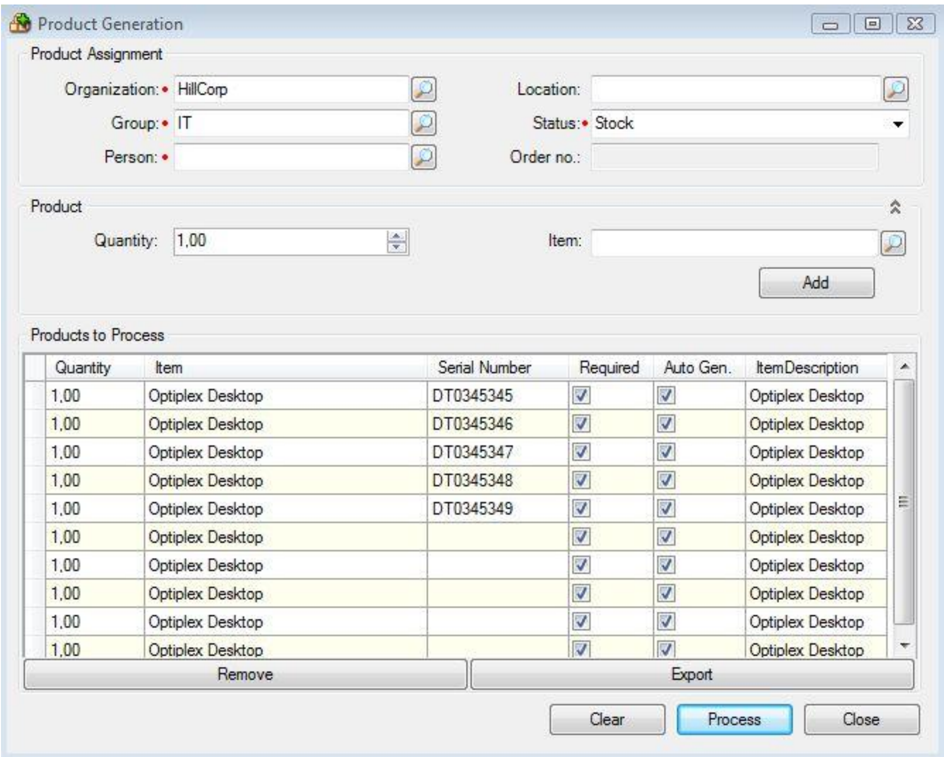


The Order Detail form includes tabs for Order Line Items, Payment and Shipping information, and Addresses (bill to and ship to). The Product tab shows products that were registered when the order was processed.

The Manage Orders form provides a light weight fulfillment function by allowing the user to find Orders that are ready to process, print reports (the administrator can configure a set of reports to run when the print button is pressed), and then process the order (marking it as processed). The process function can also export order information so that it can be imported into an external fulfillment application and register the products that were on the order.

Purchase Orders

The Purchase Order module completes the missing piece to track the full product life cycle in ITSM. Many IT organizations have their own order administration for their IT assets. The purchase order module offers IT organizations the toolset to trace the purchase order process from start to finish. A new purchase order can be created and sent through an approval process. If the PO is approved it can be sent to the supplier (standard report). When the physical goods arrive they can be processed. During processing the PO status is updated and the incoming goods are registered as new products in the CMDB. Also partial delivery is supported so you are able to track the actual status of your delivery.



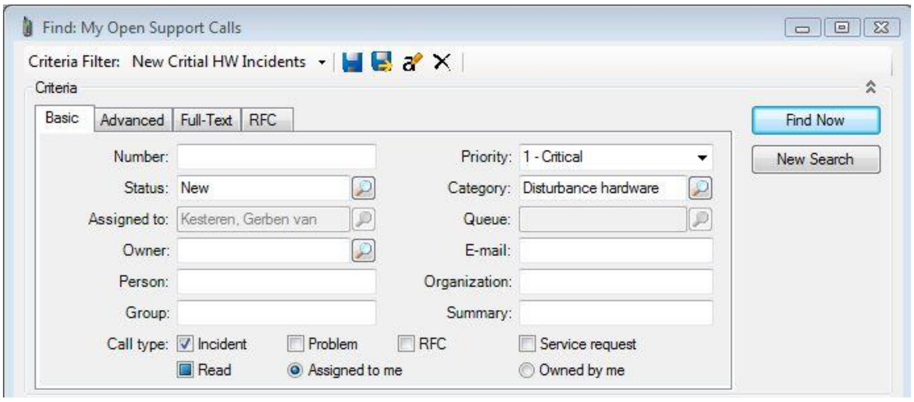
Product Generation

For IT organizations that will not use the purchase order administration in ITSM we offer a separate Product Generation form. This new feature is implemented to support easy generation of multiple products at ones including easy serial number registration, without the existence of a purchase order.

Enhancements to User Experience and Application Usability

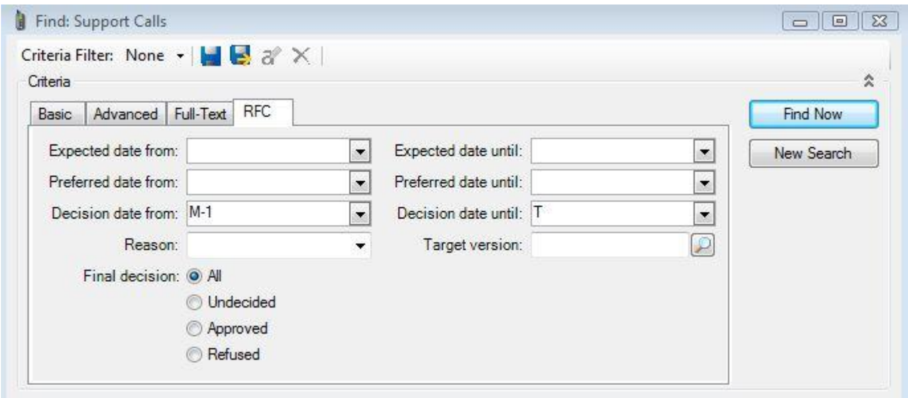
Criteria Filters

Criteria filters allow you to save particular sets of search criteria so that they can be recalled from the Find or Related form for which the criteria were set. The filters can be private (visible to the creating user) or public (visible to all users). Users can set a private or public filter as a default for a form so that the filter loads when the form loads. A module option also allows the running of filters (the equivalent of clicking "Find Now" button) automatically. This feature delivers an enormous time saver for users by allowing them to save commonly executed filter criteria and retrieve them for use as needed.



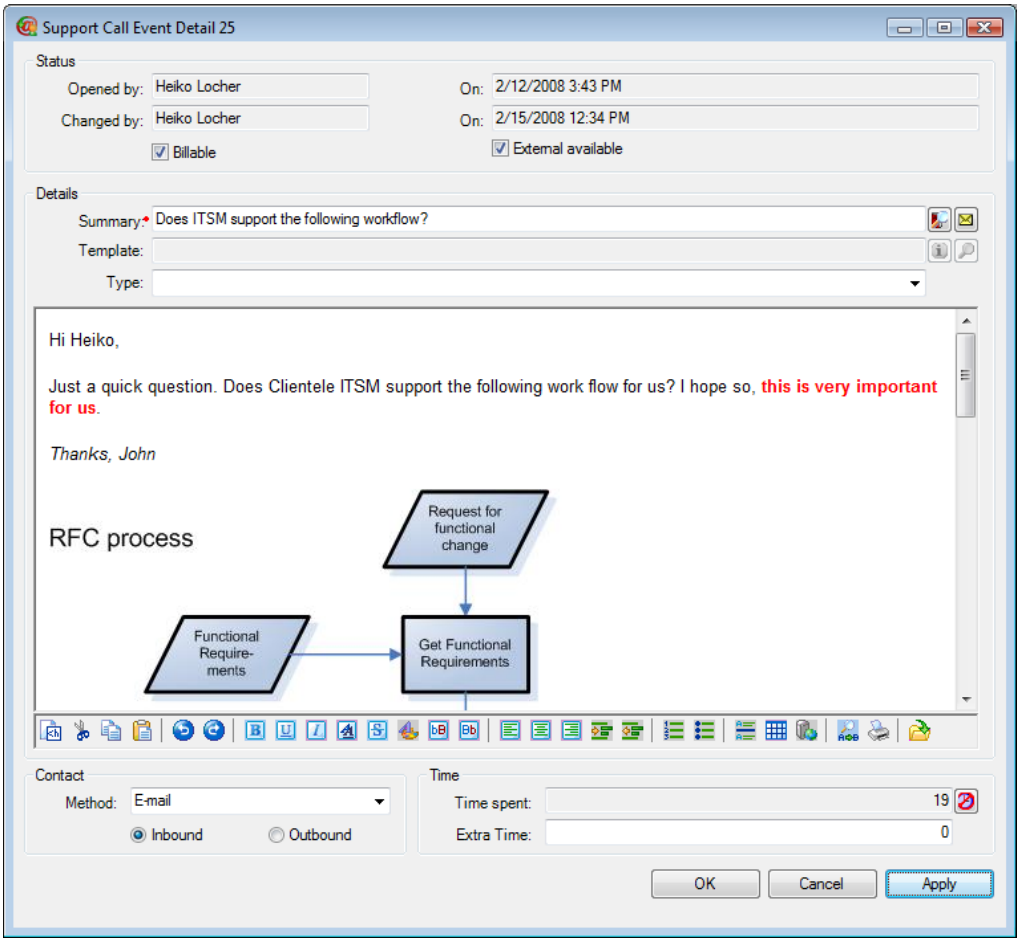
Relative Date Wildcards

You can now use certain conventions for entering dates in date fields. For example, T stands for today.
Therefore by entering T+4 you are establishing a date four days from the current day. The following conventions are available:
T for today
W for week
M for month
Y for year
P for forecast period (as defined in Clientele)



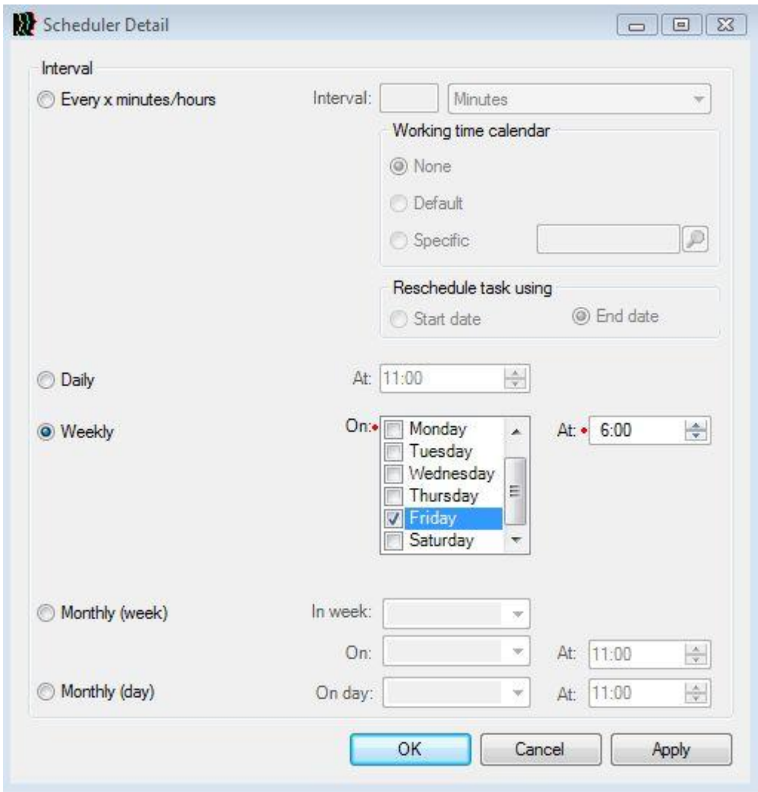
HTML Formatting

Most note and memo fields now allow users to type and edit text in HTML formatting (module options set which are used) instead of or as an alternative to plain text. Formatting is preserved in outgoing emails generated from those fields. Note or memo fields that support the formatting show a formatting toolbar under the field.



Scheduler Improvements

The scheduler used for Agent tasks can now schedule by specific time periods (daily, weekly, monthly etc.) in addition to by interval. Agents also now allow the running more than one task at the same time as opposed to waiting until other tasks are finished.



Support for Multi-book Answerbook

This feature is intended to provide a similar level of Answerbook functionality as currently available in Clientele 7.x. This allows administrators to define Answerbooks on tables other than AnswerbookPage and to search all Answerbooks from the Answerbook search form. For example, this would allow a customer to define an Answerbook on SupportCallEvents or ChangeRequests (custom module).

Full-Text Indexing and Searching

Full Text Searching permits users to search full-text indexed columns and tables to increase the speed of a search and allow for a more comprehensive search capability. Whereas SQL Server 2000 only allowed search on a single column or all the full text-indexed columns in a specific table, SQL Server 2005 supports a broader option. This ability has been extended from AnswerBook to the following forms:
Find Support Call
Find Activities
Tasks
Notes
Appointments
Correspondence
Find Items
Find AnswerBook Pages
Attachments Summary form
No changes have been made to non-full text fields that currently allow wildcard searches. However, it should be noted that new full-text search fields do not allow wildcard searching (in the field or drop down selection).

For example, to assist with supporting IT systems, if a customer call's the support desk after receiving an error message from their software or error code with their hardware, it is now possible for a support representative to search calls and call events for this customer for background information or even to search the call form for a specific mention of the error message. Likewise, if a sales person wishes to confirm a specific letter was sent to a customer concerning a specific product, they can search attachments on the related attachments form.

Import module Enhancements

Secondary key support for the Import module

This enhancement of the import module provides functionality to use a secondary key when executing data imports from external data sources. Example scenarios in which a secondary key support is needed are:

1. *Using the import module in combination with inventory tools*. When IT assets are purchased and delivered they are registered in ITSM. Most of the times, they will be registered on stock first before they are delivered to the end user. Often the import module is used to import data from inventory tools. When a new IT asset is discovered by the inventory tool, the IT asset is imported and registered in ITSM. This can cause duplicates or conflicts if the discovered IT asset is already registered before in the manual process of registering incoming IT assets on stock. By using the secondary key support the import of the inventory tool can be configured so it will not create a duplicate or a conflict but update the already existing IT asset instead.

2. *Using the import module in combination with overlapping data sources*. Information of organizational units and users (organizations, groups and people) are often imported into ITSM. In some cases from multiple data sources, like for example from an HRM-database, and from Active Directory because the HRM-database contains additional information to the Active directory data. Since the sources are from a different data type, separate imports need to be defined. Because they contain overlapping data, duplicate records are created but by using the secondary key support both imports can be complementary to each other without creating duplicates.

3. *Update existing records without creating new ones*. Organizations are sometimes receiving updates of article information from their suppliers. The import module is used to update this Item information in ITSM. In case not all articles provided in the list of the supplier are used and registered as Item and the data import was done without secondary key support not only the existing articles where updated but also the once that are in the list of the supplier and not used ITSM are added as new Items. When using the secondary key the link can be made to the existing items so only those records will be updated.

Automatically Clear Import Batch Results

During extensive usage of the import module, the ITSM database can grow rapidly caused by the registration of the batch results and related logs. Now you are able to configure to remove the related results automatically and specify how many days of related results you like keep in history.

New Import Manager for Application Users

For easy creation and maintenance of application users, a new import manager is added to import and update application users. With the introduction of the new ITSM Portal, Portal users will also be registered as application users this will save ITSM administrators a lot of time.

New Import Manager for Person Aliases

This new import manager provides key missing functionality to make the person import complete. Now also person aliases can be imported.

Run Now function

The Run Now function allows the user to run an import tasks manually on a local level. This function can be used for test purposed but also when data needs to be imported on the client side. An example is the usage of a barcode scanner containing inventory data. This barcode scanner can be connected to the local PC via the cradle and the import module can be used to import the data from the barcode device.

Additional behavior properties for import tasks

In order to have better control over the behavior of how fields are processed during import, additional properties are added to the import mapping detail. These properties can be found under the new Behavior tab. The properties can e.g. be used to define if the value of the field should only be used when a new record is added; this means the value can be updated in ITSM without being overwritten by the import the next time the import runs.

Support Call Notification Enhancement

Support call notification functionality is extended to support notifications to the Change Advisory Board (CAB) members on change of the Assign to, Status and Queue fields of a RFC.

External Help Integration

By setting certain variables and using 2 functions the ITSM administrator is able to add custom specific help. E.g. this could be process descriptions or work instructions you'd like to publish as additional information in the Online Help. This information is either embedded direct into the help or you can choose to link to external information.

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 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