



## **2009 Release guide**

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# Introducing ITSM version 2009

## *Introduction*

For more than 10 years Mproof customers have come to expect valuable enhancements to the product suites on a regular basis. Release 2009 is no exception, delivering new features that offer more configurability and functional capabilities for your business.

ITSM 2009 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 2009. 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 2009 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 2009 of ITSM. Here are the objectives and how we've accomplished them:

Objective	Achievement
Support Windows 2008 server platform	ITSM has been enhanced to support Windows 2008 Server and SQL Server 2008.
Support 64 bit operating systems	ITSM has been enhanced to support 64 bit operating systems Windows 2008 Server and Windows Vista
Provide an SDK for the ITSM Portal	Since ITSM 2008 a new ITSM portal has been introduced based on SharePoint technology. In version 2009 the Portal has been enhanced with an SDK to support Portal customizations.
Upgrade from 8.4, 2007 and 2008.	Version 2009 provides database upgrade tools from 8.4, 2007 and 2008.
Deliver high priority customer requested enhancements	Version 2009 incorporates the results of customer software change requests (SCR) and reflects real-world feedback on proposed functionality.

# ITSM 2009 New Features

## Attributes enhancements

Attributes exist in ITSM to enable easy creation of “custom fields” for key ITSM entities. This functionality is extremely powerful and gives ITSM users the ability to store additional data in a structured manner without having to customize. More and more users recognize the power of the attributes and requested us to provide additional enhancements.

## Attributes Search

The key functionality adds the ability to search for records in ITSM based on attributes. Now all find forms related to entities supporting attributes are enhanced with an attributes search tab. The new tab allows users to search on all available attributes.

Person	Group	Organization	Phone	City	Region	Postal Code	Country	Location
▶ Alcott, April	Corporate - C	HillCorp	503-235-670	Portland	OR	97201	United States	

Figure 1 Find People form with additional attributes search tab

In this example attribute *Birthdate* is used to search for contacts born after the 1<sup>st</sup> of January 1980 and have 2 children.

The attributes search criteria are compatible with the criteria filters so standard searches including attributes can be stored.

## Attributes Auto Assign

In earlier versions of ITSM, attributes needed to be added manually to a record when the user liked to store an attribute value. With this release the administrator can configure if attributes needs to be assigned automatically when a new record is created. This saves the user time when entering a new record, because he doesn't have to select the attribute before he is able to enter the data. It also gives administrators more control. Besides setting the attribute to being added to the record you can specify if the attribute is required. If the attribute is set to required, the record cannot be saved without entering a value for the required attribute just like "standard" required fields.

Auto assignments for attributes related to support calls have even more options. Not only can new support calls be added via the regular windows client but also users of the ITSM portal can create new support calls. Per interface that is used for support call entry you can configure if attributes need to be added and if they are required. So can e.g. a specific attribute be added and required if the support call is added via the self service portal while the service engineer taking the call in ITSM directly, is not disturbed by this required attribute. Depending on the call type (incident, problem, RFC, Service request), settings can be configured differently. In some cases you might want to only use attributes internally. In this case you can set the external visible flag of the attribute to false.

## Attribute Groups

Attribute groups delivers functionality specifically designed for portal usage in combination with support call templates. The typical scenario to use this functionality is entry of a new service requests through the portal. Service requests are typically created based on support call templates because they contain standard services offered by the service desk. In this process it is very common for the user making the request to provide details needed to complete the support call. With attribute groups, templates can be created to generate a standard set of attributes (questions/fields) that can be used in support call templates. So in case the portal user selects a service request template the service request automatically shows the attributes (questions/fields) the user needs to fill in, in order to finalize the request.

The screenshot shows the 'Support Call' form in the ITSM2009 portal. The form is organized into several sections:

- Contact Information:** Fields for Person (User, External), Phone number (n/a), E-mail, and Your reference no.:
- Priority and Template:** Fields for Template (Mobile Phone Support), Urgency, and Impact:
- Product Information:** Fields for Product, Item, Serial number, and Version:
- Details:** Summary and Notes fields with a rich text editor toolbar.
- Mobile Phone:** A section highlighted with a red box, containing fields for Manufacturer (RIM), Model Number (77068), Application Ins..., Internet (checked), and Minutes / Month (600).

At the bottom of the form are 'OK' and 'Cancel' buttons.

Figure 2 See the Mobile Phone section is added through attributes

Every attribute group can be used in multiple support call templates that can have multiple attributes groups. Every attribute group can have its own header and footer text in html format. By doing this every group appears as a separate paragraph in the support call. Within the group you can set the order in which the attributes needs to display on the form with the possibility of every attribute having a descriptive header and footer.

## *Notifications Enhancements*

The notification functionality in ITSM informs parties related to a support calls about status and assignment changes of support calls. Notifications are done through email and can be configured by the administrator. Tags are available to add support call data to the content of the email. The already available tags are now enhanced with the following:

- ASSIGNTO *The user or queue that is currently assigned to the support call*
- CALLDUEDATE *The due date of the support call calculated based on the service time available*
- CALLID *The unique identifier of the support call. E.g. this bookmark can be used to make sure reply emails are automatically retrieved and added to the support call as an event*
- CALLOPENDATE *The date the support call was created*
- CALLPRIORITY *The current priority of the support call*
- CALLSTATUS *The current status of the support call*
- FIRSTEVENTNOTES *The first event added to the support call*
- GROUPNAME *The name of the group related to the support call*
- LASTEVENTNOTES *The last event added to the support call*
- ORGANIZATIONNAME *The name of the organization related to the support call*
- PERSONFULLNAME *The full name of the person related to the support call*
- SHAREPOINTPORTALLINK *The url to access the support call directly via the ITSM Portal*



## *Portal enhancements*

Since ITSM version 2008 self service and field service is provided through the ITSM portal, leveraging Microsoft SharePoint technologies. In this new release of ITSM we implemented some important customer's change request; password reset and the portal SDK.

### Password Reset for Portal Users

The ITSM Portal supports multiple way of authenticating portal users. One way to authenticate portal users is forms authentication. This type of authentication is used when the portal users are not registered domain users. When the forms authentication is used, the passwords are maintained within ITSM. To reduce the workload of the administrator and to provide self service to the users we introduce strike password reset functionality.

When the user enters the portal and finds out the password is invalid or can't remember the password, the user can request a new password. Based on the username, ITSM will verify if this is a known portal user. If the user is registered as being a valid portal user, ITSM will automatically generate a new password and send the new password by email to the user. When the user receives the password and logs into the portal, the user is able to change the password manually.

### Portal Language Packs

With this new release of the portal, the following language packs will be shipped out of the box:

- Arabic - Saudi Arabia
- Chinese Simplified
- Chinese Traditional
- Danish
- Dutch
- English US
- English UK
- Estonian
- Finish
- French
- German
- Greek
- Hungarian
- Russian
- Spanish
- Swedish

### Portal Software Developers Kit

Because of the flexibility and extensibility the new portal platform provides, many requests have come from customers and partners to be able to make changes and extend our standard webparts. In this release we added the tools and documentation to enable customizations in the ITSM Portal.

The Portal SDK provides you with tools to deploy an ITSM Portal development environment and the necessary documentation and examples to adjust existing functionality or even create additional functionality. From simple changes in the UI e.g. make fields (in)visible for portal users, change data limitations for portal user roles and adding new functional portal modules using ITSM modules, all are now possible. Before you start using the Portal SDK, remember you need to have the required .net developer skills.

## Support for Right to Left layout and large DPI

### Right to left Layout

One of the new languages added in the 2009 release is Arabic. This language reads right to left and requires a right to left layout of the interface. To enable full support for the Arabic language, right to left layout support is implemented for the complete ITSM interface. See *example screenshot below*.

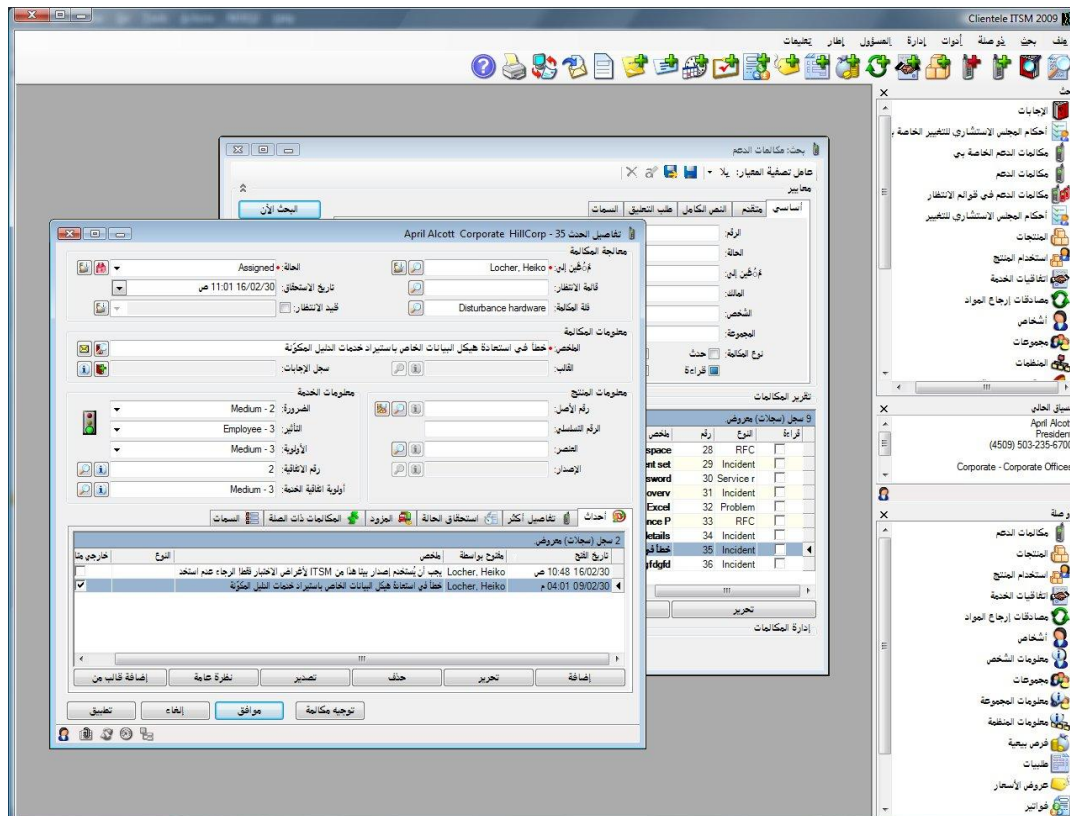


Figure 3 ITSM Left to Right

### Large DPI

ITSM supports Large DPI and will scale with the windows settings. In Windows you can make the text and other items, such as icons, on your screen easier to see by making them larger. You do this by increasing the dots per inch (DPI) scale.

## 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 support for the key IT processes outlined by the ITIL best practices. It allows organizations to offer timely and professional IT services with detailed management IT support and IT delivery processes.

Comprehensive reporting, trend analyses and performance management functions complete the full ITSM suite. Clientele software is highly customizable and its service oriented architecture (SOA) and web services provide easy and flexible collaboration. 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](http://www.clientele-itsm.com)

### **About Mproof**

Mproof is a leading provider of IT service management, customer support and self service software solutions. Founded in 1997, Mproof helps their worldwide customer base to professionalize their services and align them with the business needs. Mproof's offices are located in the Netherlands.

Outside the Netherlands, Mproof cooperates closely with strong channel partners for product sales, implementation and support. For more information, please visit [www.mproof.com](http://www.mproof.com)