

Release Guide Clientele ITSM 2011



Complete. *Not complex*



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Disclaimer 2011

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1 Introducing Clientele ITSM version 2011

1.1 Introduction

For more than 15 years, Mproof customers have come to expect valuable enhancements to the product suites on a regular basis. Release 2011 is no exception, delivering new features that offer more configurability and functional capabilities for your business. Clientele ITSM 2011 reflects our fundamental philosophy as a software provider by:

- placing customers at the centre of everything we do
- developing and delivering world-class software to help our customers achieve operational excellence
- provide innovative technologies that empower our customers to become market leaders
- surrounding our customers with resources and self-service tools to provide world-class customer service and satisfaction
- delivering single point accountability in everything we do

1.2 What is inside

This guide covers the features, functionality and technology introduced with Clientele ITSM 2011. 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.

1.3 Clientele ITSM 2011 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 on-going effort, we established a list of objectives for the 2011 release of Clientele ITSM. Here are the objectives and how we've accomplished them:

Objective	Achievement
Support ITSM Operations Management Processes	New features allow for more accurate monitoring and controlling of tasks related to Operations Management including detailed planning functionality.
Support for ODBC import sources	Additional to the XML, Active Directory and OLEDB import sources, the import agent task now supports ODBC data sources.
Deliver enhanced compatibility options	Options now available allowing for compatibility with Microsoft SharePoint 64bit and Microsoft Office 64bit.
Deliver high priority customer requested enhancements	Version 2011 incorporates the results of customer software change requests (SCR) and reflects real-world feedback on proposed functionality.
Upgrade from 2008, 2009 and 2010	Version 2011 provides upgrade tools from version 2008, 2009 and 2010

2 Clientele ITSM 2011 new features:

2.1 IT Operations Management support

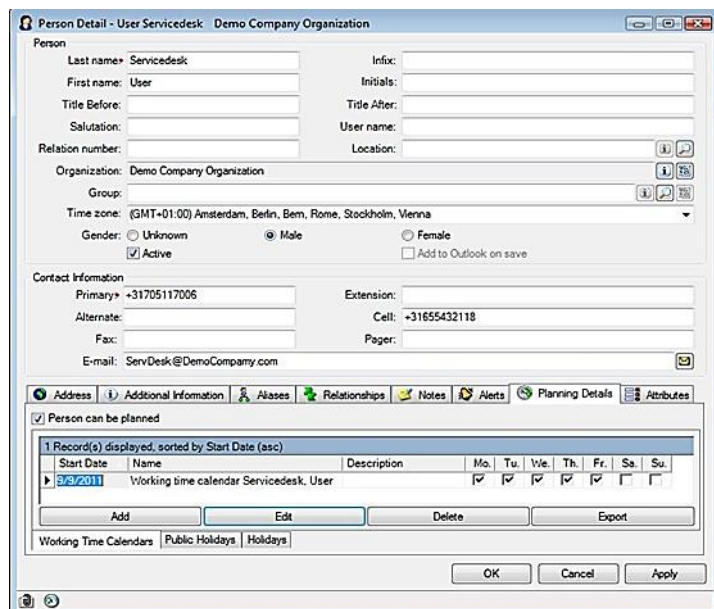
Operations Management executes and monitors the operational day-to-day business: the IT Operations Management process consists of performing continuous activities as well as the control and maintenance of the IT infrastructure so services can be delivered and supported in accordance with the agreed Service Level Agreements.

Related functionality delivered in Clientele ITSM 2011

To support the core elements of IT Operations Management, we have introduced the following functionalities:

2.1.1 Manage resource availability

Before you can properly start planning operations activities for resources, you will have to configure when resources are available. There are three parameters that influence a resources' availability:



Start Date	Name	Description	Mo	Tu	We	Th	Fr	Sa	Su
3/21/2011	Working time calendar Servicedesk, User		✓	✓	✓	✓			

Time zones

Clientele ITSM supports the use of resources in different time zones. The resource manager can select and save in which time zone a resource resides. The time zone settings are used to calculate default date time values for new activities and to present the working time calendars with the correct offsets when using the planboards.

Personal Working Time Calendars

With the 2011 release, we enable you to manage a resources' working time calendar. You are able to define the schedule per resource. For every weekday, one or more periods of working time can be created. The working time calendars are used in planboards to show the operations managers when resources are available and activities can be planned.

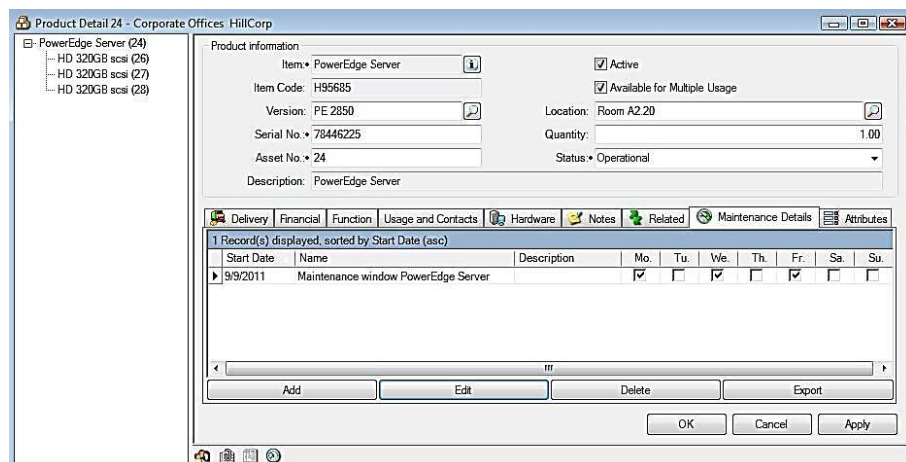
Holidays

Both public and personal holidays can be managed per resource. For public holidays, we enable you to create a Public Holiday Calendar and link it to a resource. Multiple Public Holiday Calendars can be linked to one resource. Personal holidays are stored as appointments of a specific type. Both are visible on the planboards, so operations managers can see them when planning activities.

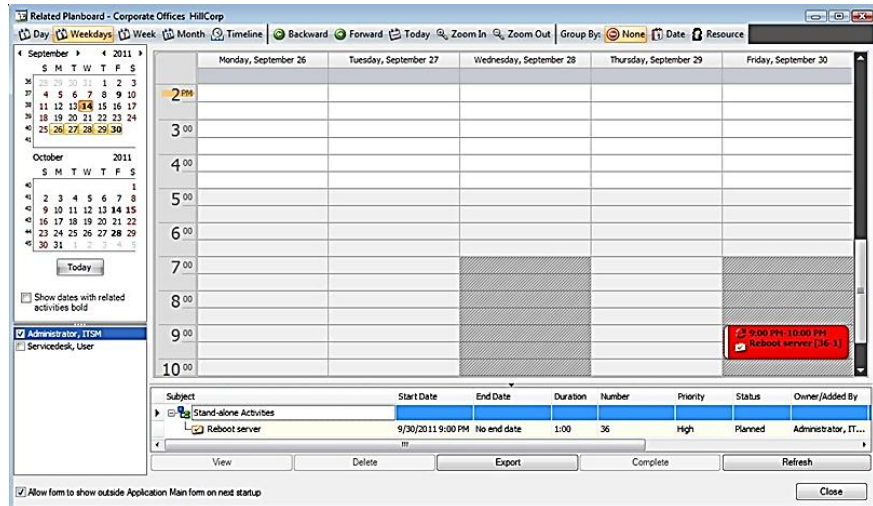
2.1.2 Manage configuration items

Maintenance Windows

As with resources, it is important to identify and store when activities can and may be executed so it has as minimal of an impact on operations as possible. For configuration items, we allow you to set-up maintenance windows in a similar way as we allow you to create Working Time Calendars, so operations managers can take these into account when scheduling monitoring tasks or planning other operations activities. Maintenance windows are also graphically represented in the appropriate planboards.



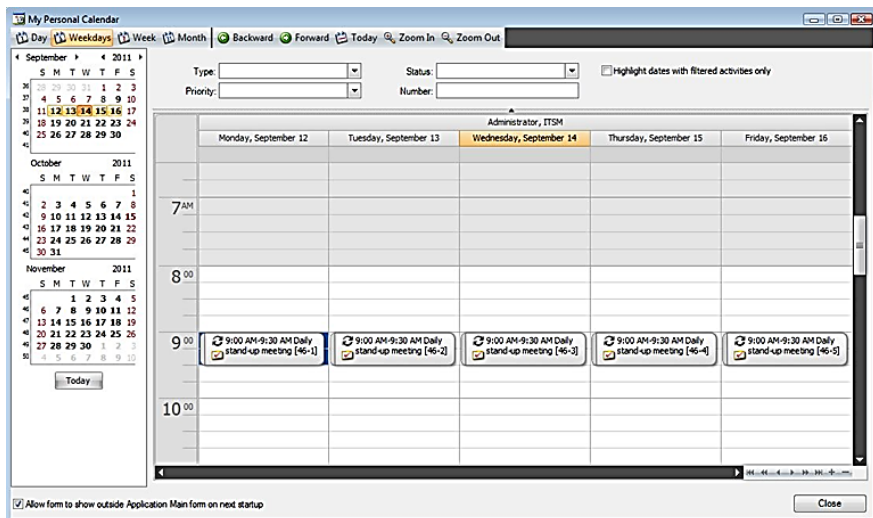
The Planboard below shows the maintenance windows as grayed out areas:



2.1.3 Activities

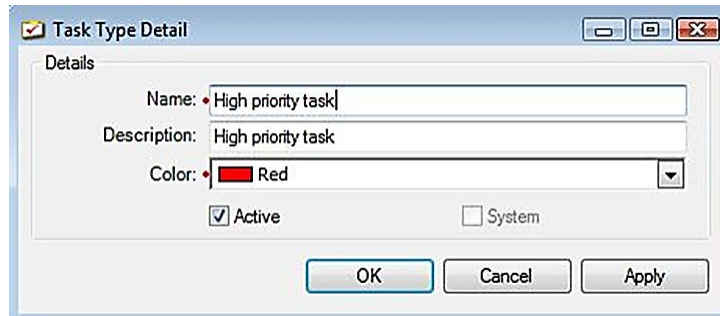
Recurring activities

With this new release, we enhanced activities to support the creation of recurring activities. We enable the user to create recurring tasks and appointments with a wide set of scheduling options.



Task types

Task types help you to distinguish between different types of work. You are able to adjust the list to fit your needs. For every task type, a color can be specified that will be used when displaying the tasks on the planboards.

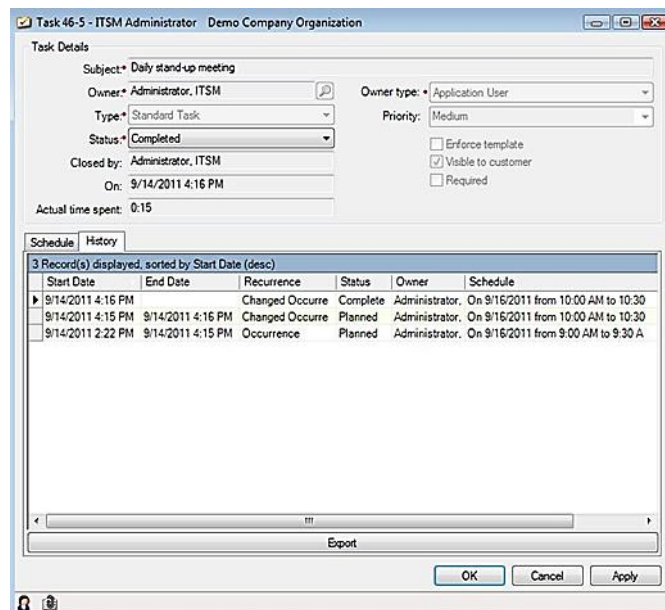


Activity statuses

In previous versions of Clientele ITSM, you were limited to a list with system statuses. In ITSM 2011, we separated this activity status list into two new lists - one to hold all 'Open' statuses and one for all 'Closed' statuses and we also allow the system administrators to add their own values.

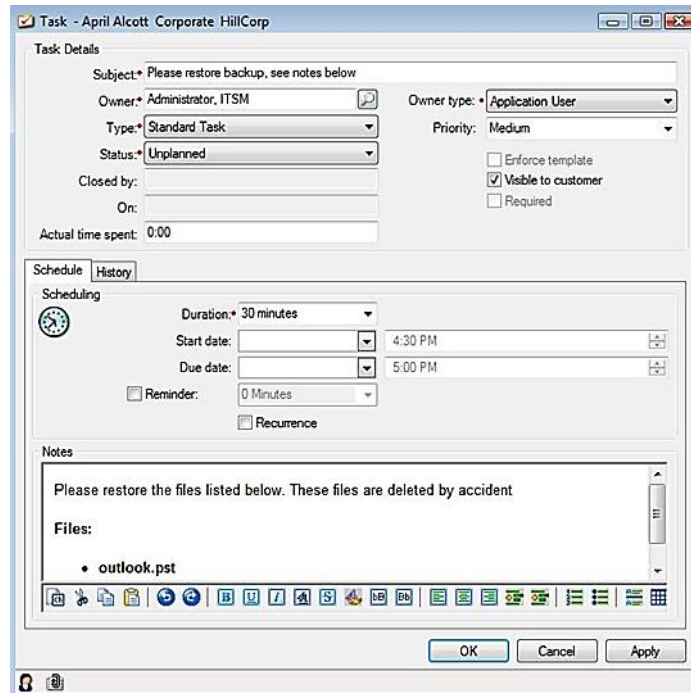
Change tracking

A new History-tab is added to the Task and Appointment detail forms. On this tab, a grid is shown that lists all Owner, Status, Schedule and Recurrence changes.



'Unplanned' activities

We now support the creation of task and appointments without date settings. This allows you to define work that needs to be done without specifying when it will be done. In a later process the responsible user for planning the operations activities can specify the correct time and date to finalize the planning.



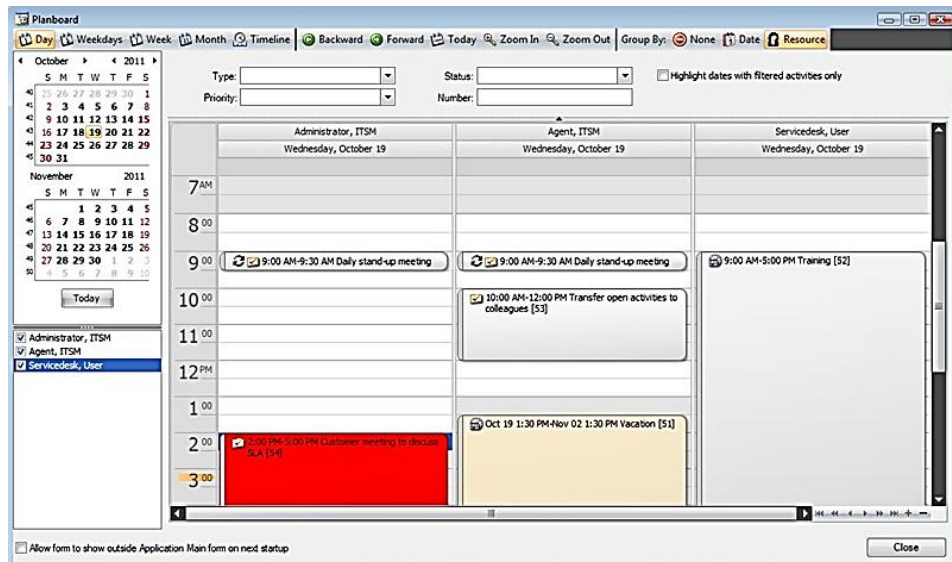
2.1.4 Planboards

We have introduced three planboards that provide you with a detailed graphical presentation of resources' calendars and their planned activities. On the planboards you are able to adjust the view (day, weekdays, week, month and timeline), change the selected period and change grouping (by date, resource or no grouping). All tasks are drawn using the color specified within the task type definition. A tooltip with detailed information about the activity and the related record is available to quickly see the contents when finalizing planning.

Besides this basic functionality, which all planboards share, we have customized them to a specific need.

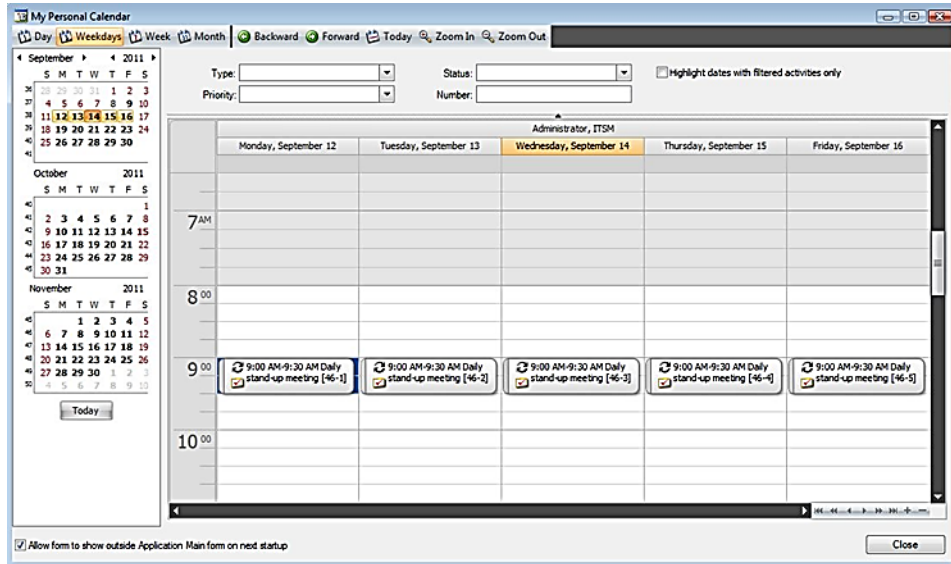
General

This planboard allows you to browse through all resources and all activities. If you are looking for an overall picture of all scheduled activities this is your main entry point. You are able apply criteria on activity status, - type, - priority and -number. Activities that match the criteria will be highlighted on the planboard. All other activities will still be drawn although suppressed. This allows for easy identification of specific activities on the planboards without losing information about available time slots.



Personal

The personal planboard is similar to the general planboard, but it is limited to the logged in user.

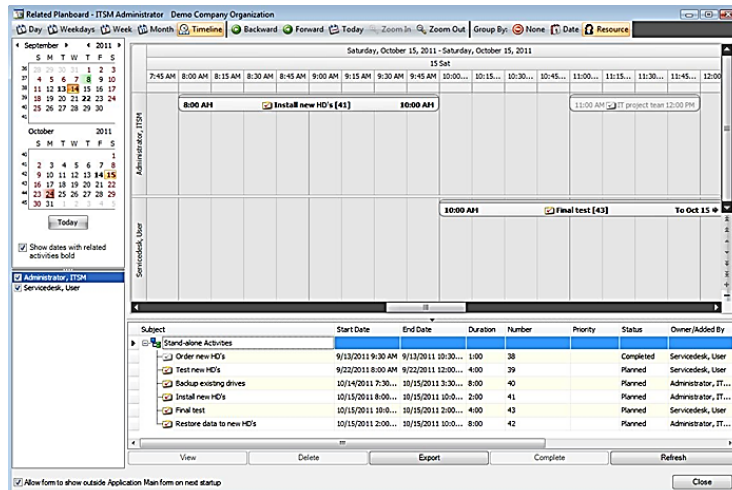


Related

On related planboards we use the same highlight and suppress functionality for easy identification of the activities related to the entity you have opened the planboard for. Also, we added additional information to the related planboard when opened from a support call or product.

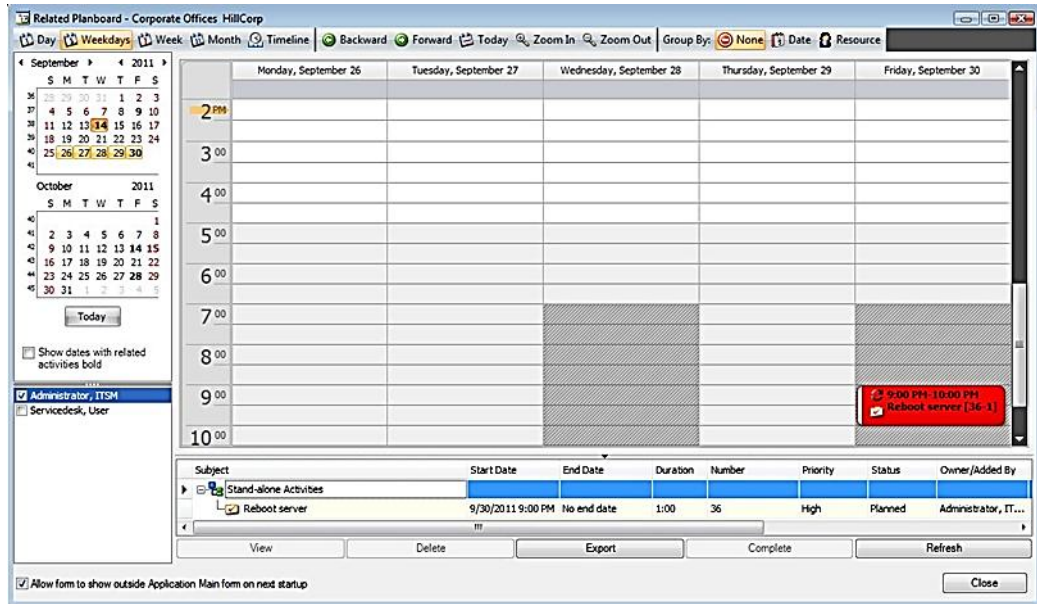
Support call related

When opened from within a support call, detail from the support call open date and due date are drawn as well as the maintenance window of the product selected within the call. At the bottom of the related planboard form the activity grid is shown. Using drag 'n drop you are able to plan the activities within the resources' calendars.



Product related

On product related planboards, the maintenance windows are drawn so operations managers can easily schedule maintenance in the correct time slots.



Subject	Start Date	End Date	Duration	Number	Priority	Status	Owner/Added By
Stand-alone Activities							
Reboot server	9/30/2011 9:00 PM	No end date	1:00	36	High	Planned	Administrator, IT...

2.1.5 Integrating operations into the Incident, Change and Request fulfillment workflows

With the IT Operations Management process in place, all activities related to the IT infrastructure will be managed under the responsibility of this process. This indirectly means that Incident management, Change management or any other process for that matter are no longer responsible or even permitted to perform activities on the IT infrastructure. This shift in responsibility asks for a tighter integration between the two. With ITSM 2011 we enhanced the UI and workflow to improve collaboration.

New UI

The user interface for activities related to support calls has been greatly improved. A new tab is added to the support call forms. On this Activities tab, we show a grid which presents an overview of all activities related to the call, both stand alone and related to action plans. Additionally, the action plan hierarchy is shown, including the specific logic regarding required activities and sequential completion.

Default action plans

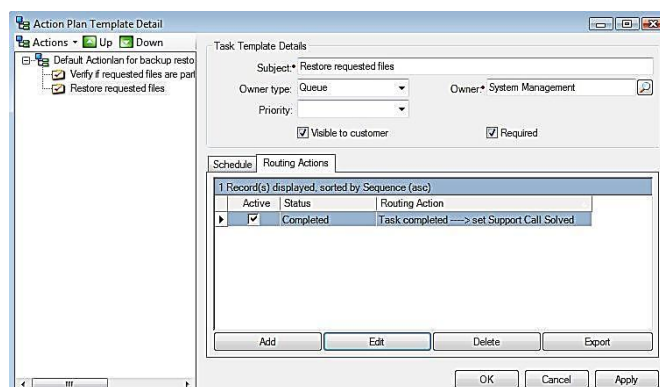
Also available is the ability to specify action plan templates that can be added to new support calls by default. The setting can be adjusted per support call type; Incident, Service Request, RFC and Problem.

Multiple action plans

You are now able to add an additional action plan to a support call once the previous one has been closed. This allows you to break-up a complex plans into multiple smaller ones that can be applied when appropriate. Also it allows you to keep the history of cancelled or skipped plans related to the call while working on a current open action plan.

Automatic support call routing

To improve the collaboration, we added functionality that allows you to update support calls (Incidents, Service Requests, RFC's and Problems) when related action plans or action plan activities change status. You can now configure automatic support call assignment and status updates based on status changes of activities.



2.2 Microsoft Office 2010 x64 compatibility

With Clientele ITSM 2010 we supported Microsoft Office 2010 x86 already. We have now added support for the x64 version of Office as well. Depending on the Microsoft Office version installed on the client machine, Clientele ITSM will start and run as either a 32 or 64 bit process.

2.3 Microsoft SharePoint 2010 compatibility

Together with Clientele ITSM a new version of Clientele Portal is released. Clientele Portal 2011 is made compatible with Microsoft SharePoint 2010. Of course the SDK for Clientele Portal is also updated so customizations made for the self-service portal can also be migrated and made compatible with SharePoint 2010.

3 Additional information

3.1 Compatibility

Clientele ITSM is now compatible with:

Microsoft Windows XP 32 and 64 bit
Microsoft Windows Vista 32 and 64 bit
Microsoft Windows 7 32 and 64 bit
Microsoft Windows Server 2003 32 and 64 bit
Microsoft Windows Server 2008 32 and 64 bit
Microsoft Windows Server 2008R2
Microsoft Office 2003
Microsoft Office 2007
Microsoft Office 2010 32 and 64 bit
Microsoft Office SharePoint Server 2007
Microsoft Office SharePoint Server 2010
Microsoft Windows SharePoint Services 3.0
Microsoft SharePoint Foundation 2010
Microsoft SQL Server 2005 32 and 64 bit
Microsoft SQL Server 2008 32 and 64 bit
Microsoft Visual Studio.net 2008

3.2 Languages

Clientele ITSM 2011 is currently available or planned for availability in: English US, English UK, Dutch, German, French, Spanish, Swedish, Chinese Simplified, Chinese Traditional, Russian, Polish, Estonian, Greek, Hungarian and Brazilian.

3.3 Upgrades

The upgrade paths supported from this release are from versions 2008, 2009 and 2010.

4.0 Product Distribution

Clientele ITSM 2011

Clientele ITSM Portal 2011

Clientele ITSM 2011 released as General Available, 29 September 2011.

About Clientele ITSM

Clientele ITSM provides you with a complete software suite integrating all the key IT processes outlined in the ITIL best practices. It enables customers to be "in control" of their service delivery and support by helping to align IT services to the business needs, typical to mid-sized organisations. Although Clientele ITSM is extremely feature rich and easy to implement by default, its platform enables flexibility and allows for customisations without having to worry about future upgrades. Comprehensive reporting, trend analyses and performance intelligence functions complete the full ITSM suite, empowering all ITSM users with the information they need to excel in their field. Customers benefit from more than 15 years of development and investment around Best Practice principles, providing guidance through the ITIL processes. Clientele ITSM's extensive customer base, which includes some of the world's best known brands, spans across a wide range of verticals and geographical markets. Clientele ITSM is Pink Elephant verified for the key IT processes and is available in 15 languages at no extra cost.

For more information please contact, www.clientele-itsm.com

About Mproof

Mproof specialises and provides IT Service Management software solutions for the midmarket. From its headquarters in the Netherlands, Mproof supports their worldwide customer base to professionalise their services and align them to their changing business needs. We provide innovative technologies that empower our customers to become market leaders. Mproof, a Microsoft Gold Certified partner, was founded in 1997 and is a privately held company. Our global presence is further strengthened by a close cooperation with strong channel partners for product sales, implementation and support.

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