Release Guide
2012 Fall Release

Clientele ITSM

Complete. *Not complex*

About this Guide

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This manual is subject to change without notice. The contents of this manual are believed to be current and accurate as of its date of publication. Changes to this manual between reprinting and other important information about the software products are made or published in release notes and you are urged to obtain the current release notes for the software product.

We welcome user comments and reserve the right to revise this publication and/or make improvements or changes to the products or programs described in this publication at any time, without notice.

Disclaimer 2012

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1 Introducing Clientele ITSM version 2012.2

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 2012.2 is no exception, delivering new features that offer more configurability and functional capabilities for your business. Clientele ITSM 2012.2 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 2012.2. 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 ITSM 2012.2 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 2012 release of Clientele ITSM. Here are the objectives and how we've accomplished them:

Objective	Achievement
Provide a single (configurable) view of the workload for the service desk user	Version 2012.2 has enhanced dashboards with data grids and a preview pane to support personal dashboards for service desk users.
Add support for business approval requests.	In version 2012.2 you now can define the approver for any organizational unit and specify per service if business approval is required. When needed business approvals are automatically generated and assigned to the appropriate manager.
Extend the service catalogue with IT chargeback functionality.	Version 2012.2 allows you to generate quotes and invoices from catalogue requests
Reduce the manual steps to update the CMDB when processing service catalogue requests	Version 2012.2 includes a wizard to simplify CMDB item generation from catalogue requests.
Update the current .net framework to a newer version	Version 2012.2 has been migrated to Microsoft .NET framework 4.0.
Deliver high priority customer requested enhancements	Version 2012.2 incorporates the results of customer software change requests (SCR) and reflects real-world feedback on proposed functionality.
Upgrade from 2010, 2011 and 2012	Version 2012.2 provides upgrade tools from version 2010, 2011 and 2012

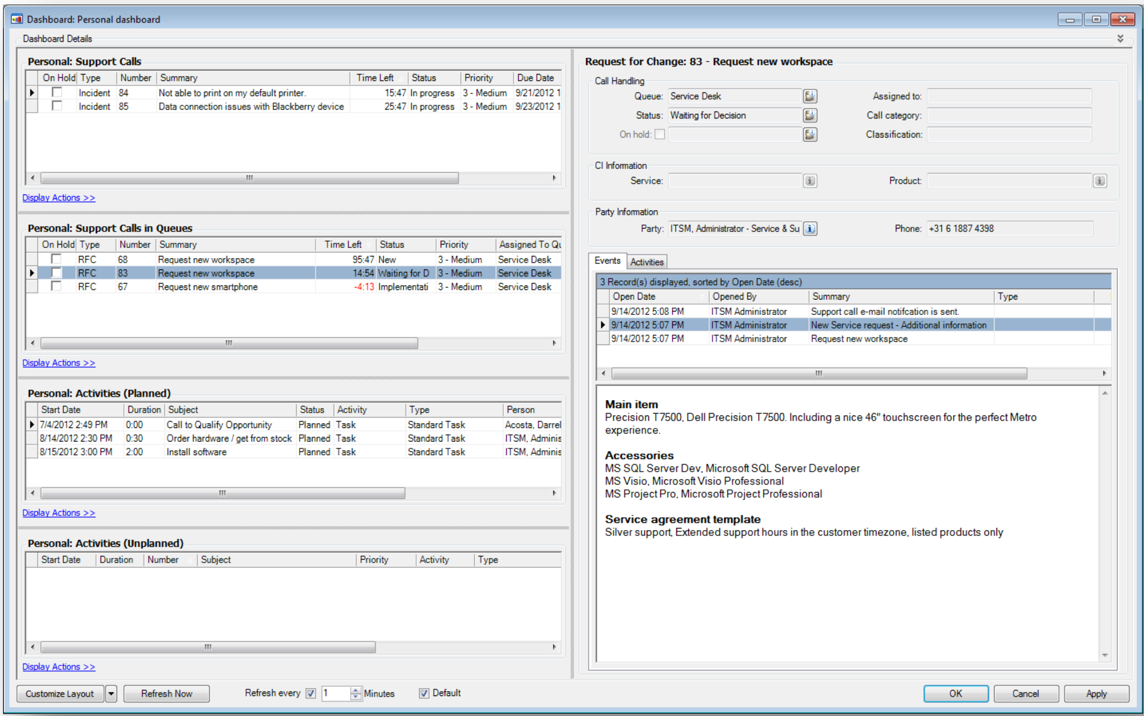
2 ITSM 2012.2 new features:

2.1 Personal Dashboards

Clientele users can now create a personal dashboard which they can use to approach their work in a more organized way. The dashboard called “Personal dashboard”, which is shipped by default, comes with four grids: assigned support calls, support calls assigned to the users’ queues, planned activities and unplanned activities.

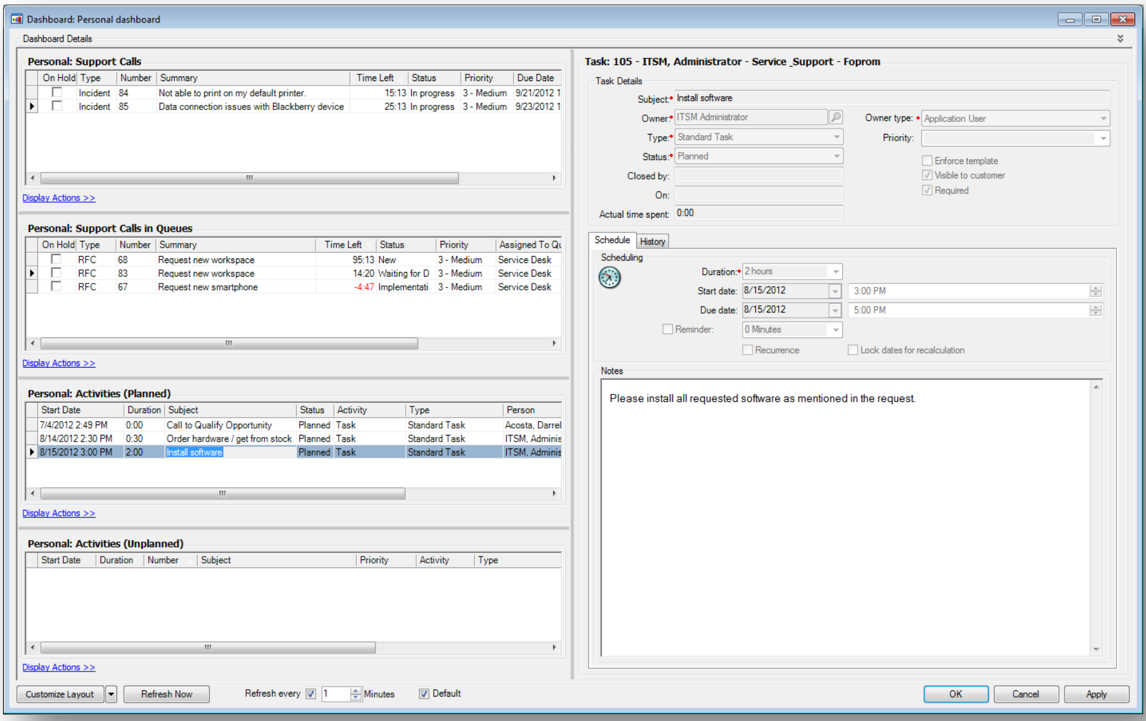
All four grids are based on standard Clientele find forms. To personalize the data for the logged in user, we have added new tags that can be used in search criteria. The tags can be used in all find forms including the criteria filters.

The shipped dashboard is a sample of how the new functionality can be used, but can be modified by the users according to their needs. Data grid dashboard components can be based on all find form data sources. By default the grid settings of the source are copied to the new data grid component. All grid settings like column order, visibility and sorting can be altered by a user. The settings are stored per user, per dashboard.



Besides support for data grids on dashboards we introduced another new dashboard component, a preview pane. The preview pane delivers the most relevant information at a glance.

The preview pane currently supports two entities, support calls (shown in the screenshot above) and activities (displayed in the screenshot below). Once a data grid with data of either one of these entities is added to a dashboard, the preview pane will show the data of a record selected in a grid.

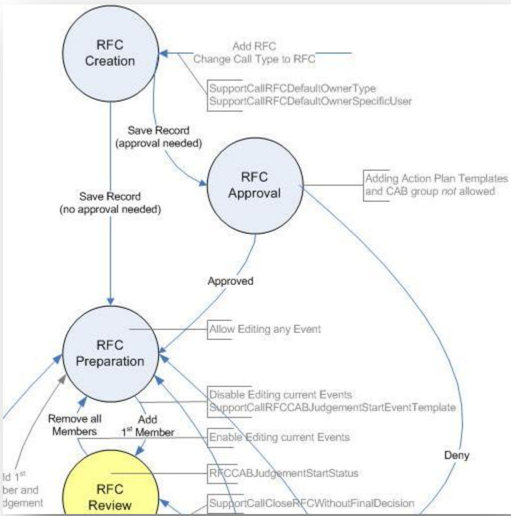


To provide quick access to the personal dashboard, or any other dashboard for that matter, we have added an option to mark a dashboard as a default dashboard. This is done on a per user basis. If a default dashboard is configured, it will automatically be opened as soon as the application starts. If a default dashboard is (accidently) closed it can be opened using the new toolbar item.

2.2 Business Approval Requests

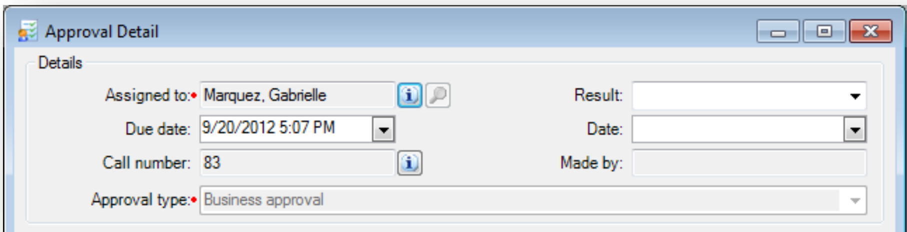
The Service Catalog functionality in the 2012.2 release has been enhanced to support the ability to ask for approval before a request is send to the IT department. For changes where a business approval is required, an automatic request for approval is sent to the manager or approver of the applicant.

This new (optional) step in the RFC process is fully supported with end user functionality in the ITSM portal and with support call notifications so an approver can be notified in case a new request is added and awaits approval.



The business approval functionality is implemented as a new state in theRFC logic. While an RFC resides in the RFC Approval state, no action plan template or CAB group is applied to the RFC eventhough they may be part of an RFC template. Once, and only if, the RFC is approved the action plan template and CAB group will be applied. This business logic is implemted to limit the disturbance for the IT department.

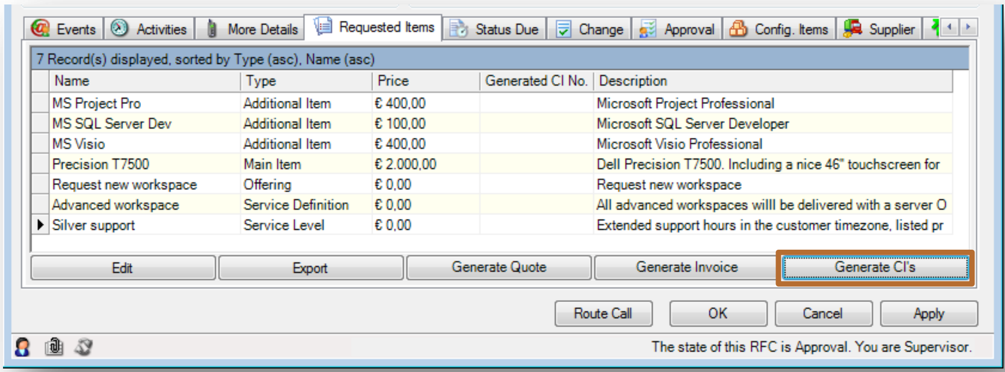
The business approval functionality is implemented using the find and detail forms that were originally used for CAB judgements. In this release the forms are renamed to ‘Find: Approvals’ and ‘Approval Detail’. To distinguish between CAB Judgements and Business Approvals we have introduced an Approval Type attribute.



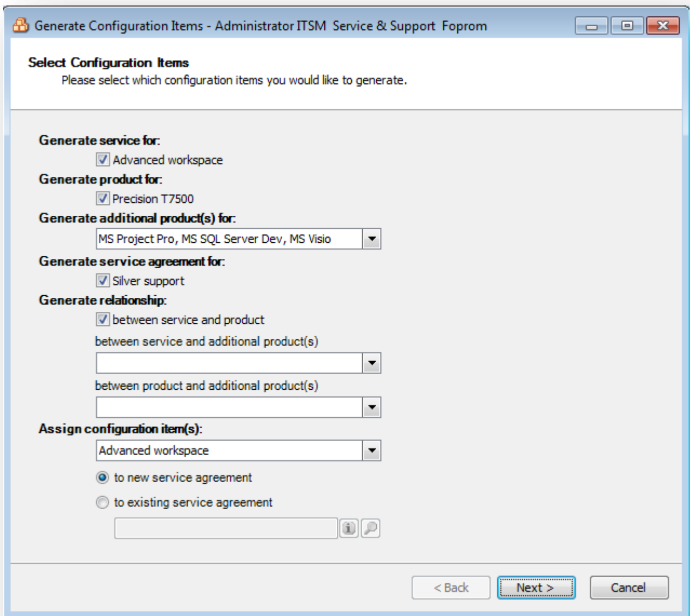
2.3 Automated CI Generation

In this release we have changed the way new requests are logged and handled after they have been approved. A request from the service catalog can now be automatically converted, using a step by step wizard, to create the CMDB items for all requested items and service agreements. Extra steps for further processing of the service catalog request are eliminated which makes the work of a configuration manager a lot easier.

As a configuration manager you can start the wizard by pressing the Generate CI's button on the new tab Requested Items. (This tab is only available on calls created via the Service Catalog.)

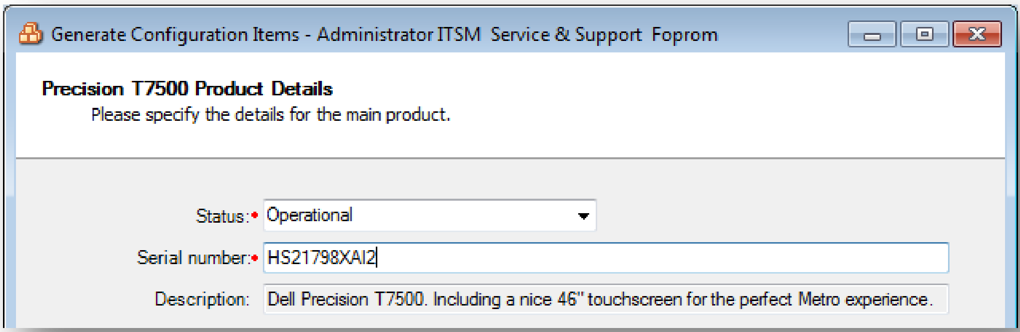


The wizard starts with the main page where you can specify the items you'd like to generate. You are able to generate all the items at once or run the wizard multiple times to generate parts of the request.

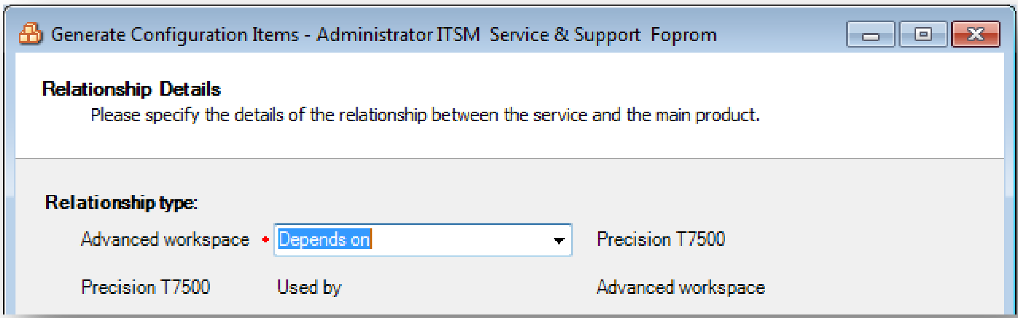


Once a selection is made you'll be guide trough the wizard. On every page you'll be asked to specify the details.

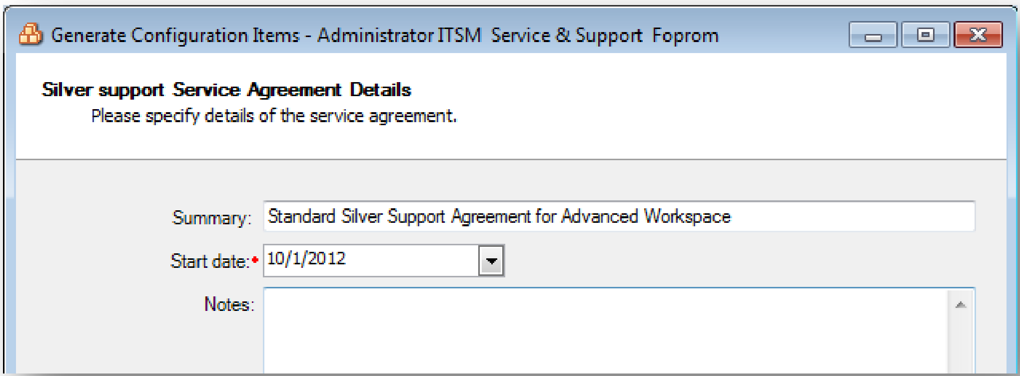
For example for the main item of the request:



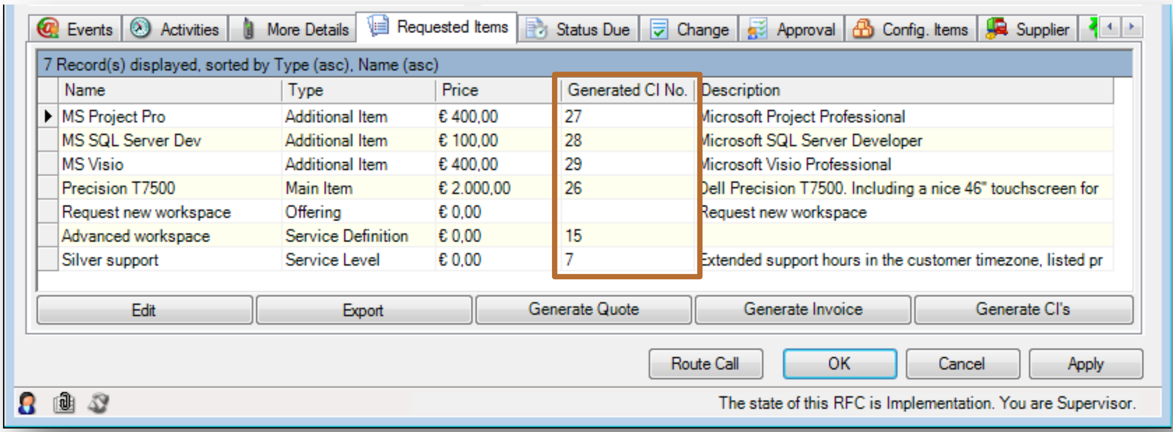
The relationships between the service and the main item:



Or the service agreement:

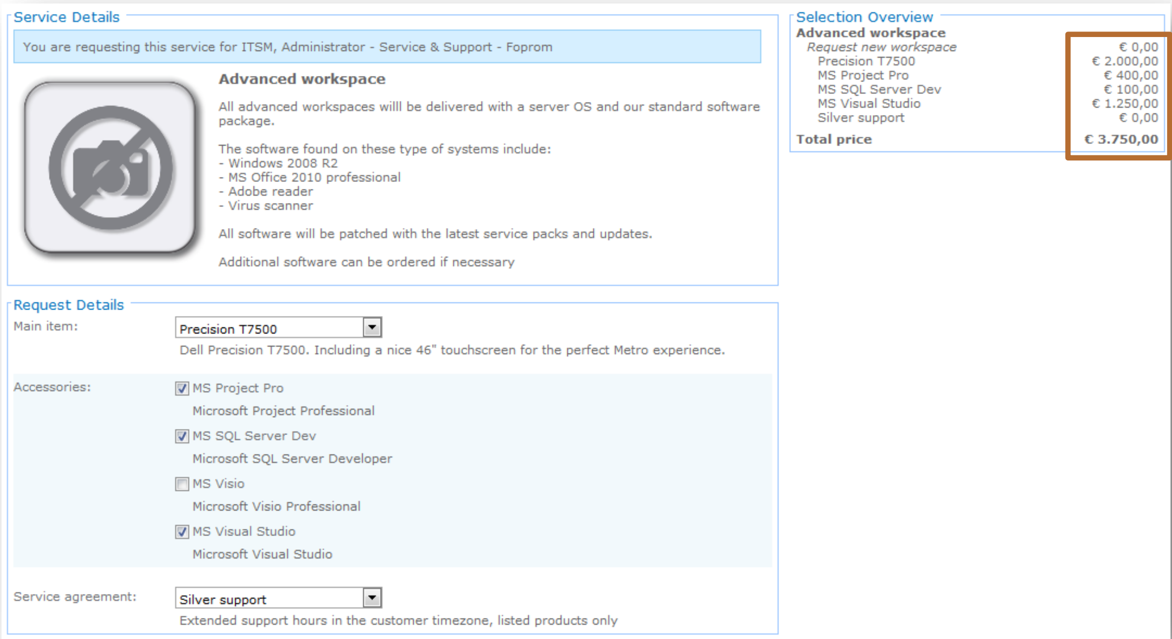


After the wizard has been completed the request is updated with links to all the generated items. So it is always possible to see which CI's are created for a request, and you can review the CI's details from the request.

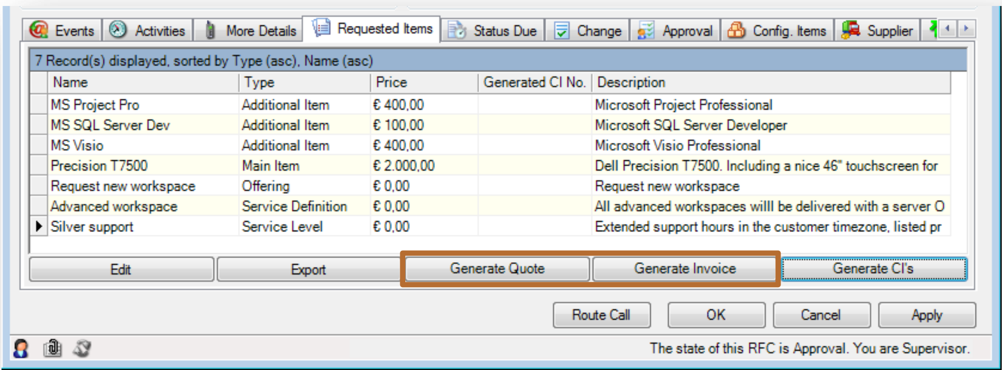


2.4 IT Chargeback

In addition to the extensive functionality offered by the service catalog and service level management process now financial processing has been added. This is a welcome addition for end users, as well as internal and external customers. Now the customer has direct insight into the price or cost of the service they are requesting using the service catalog. We have added a price column to all the related grids as well as the overview that builds up while requesting a new service.



The back office can now directly generate quotes and invoices, from a request. This can be done from the tab Requested Items that is available on all requests that are submitted using the Service Catalog.



Multiple quotes and/or invoice can be created per request. When a generate button is pressed all the rows in the Requested Items grid are copied to the new quote or invoice. From this point on all the standard functionality related to the entity (quote or invoice) is available.

2.5 Microsoft .Net Framework 4.0

The Clientele ITSM application has been migrated to Microsoft .NET Framework version 4.0. This has an effect on the system requirements for the servers and clients. Please refer to the installation guides for further details regarding the system requirements.

Additionally the Clientele SDK has been migrated, upgraded and made compatible with Microsoft Visual Studio 2012. With this upgrade support has been dropped for older versions of Microsoft Visual Studio.

2.6 Customer requests

With every release of ITSM we try to enhance the product with bug fixes, functional requests and improvements requested by our customer base. In the 2012 fall release we have made changes to several areas of the application. Please find a list of the changes made below

2.6.1 Support call notifications

Support call notifications have been enhanced in several areas.

- *Criteria*:
  We have added support call category, priority, service definition and item to the criteria section.
- *Triggers*:
  Besides the criteria, which can fire-off a notification when a support call is updated to match all criteria values specified, we introduced 3 new triggers that can send a notification. There are two triggers related to events added via the support call retriever or via the ITSM portal. The other trigger is used to notify business approvers in case of a new approval request. The new triggers can be found in the 'Notify when'-section on the Support Call Notification detail form.
- *Tags*:
  The list with tags have been extended. Please see the on-line help for their names and descriptions.
- *Recipients:*
  In the recipients list ('Notify'-section) we have added an option to send a notification to a business approver. Also added to this section is a new check box 'Add event on notification sent'. When checked, a new support call event will be added to a support call that triggered the notification to be sent. This helps to keep the support call up-to-date with all incoming and outgoing communication.

2.6.2 Support call find form changes

We have made some changes to both the criteria and the result grid.

- *Criteria*:
  Location is added to the first tab of criteria. On the dates tab we added new date range criteria to search for calls that are last changed within a certain period.
- *Grid*:
  Three new columns are added: 'Time Left Including On Hold', 'On Hold Reason' and 'Last Change Date'

2.6.3 Clear email queue

The email queue table is used to store all outgoing emails sent by the application. Depending on the configuration of the 'DeleteProcessedEmailNotifications'-module option the records are deleted or saved for history purposes once they are successfully delivered to the email server. We have now added a new menu item to the Manage ➔ Logs menu to manually clear the email queue table.

2.6.4 Appointment types and color coding

Since the introduction of task and appointment types in ITSM 2011, you were only able to manage task types. The list of appointment types was limited and restricted to some system entries. With this release we added the possibility to create your own appointment types and choose and change their colour

2.6.5 Logged in user visible in the application title bar

Another long awaited request. In case you had multiple sessions of Clientele open on one machine, i.e. one session with the admin account and another with your personal account, it was difficult to distinguish between the two. In this release we added to logged in user to the title bar of the application.

2.6.6 Routing actions

Routing actions have been enhanced. It is now possible to update a support call to indicate it as being on-hold including the on-hold reason.

2.6.7 Supplier reference increased

The supplier reference field in support calls has been increased to 40 characters.

2.6.8 Added external visible to support call event templates

On the support call event template detail form we have added an option to indicate whether or not an event based on the template should automatically be marked as external visible.

2.6.9 Email retriever enhancements

Two things have been changed in the 'Email Retriever'-agent task. The most important change is a new option added to the 'Email configuration'-tab. On this tab you will now find a new checkbox called 'Ignore body text after' and a text box in which you can configure a specific phrase. If configured the email retriever task will scan all email bodies of retrieved emails for this specific set of characters. If a match is found in the email body, the email will be truncated after the specific set of characters. The main reason for adding this functionality is to avoid adding new support call events with the full email conversation history to support calls. This often happened when users replied to automated emails sent by the application.

The other change made to the retriever is a small one and has to do with the way the subject of an email was stored. Previously it was stored in both the summary and the body of a support call event. This was redundant, so we changed it to store it only in the summary.

3 Additional information

3.1 Compatibility

The Clientele products are 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 Windows SharePoint Services 3.0
- Microsoft Office SharePoint Server 2007
- Microsoft SharePoint Foundation 2010
- Microsoft Office SharePoint Server 2010
- Microsoft SQL Server 2005 32 and 64 bit
- Microsoft SQL Server 2008 32 and 64 bit
- Microsoft Visual Studio 2012

For more information regarding minimum service pack levels please read the system requirement section of the installation guides.

3.2 Languages

Clientele ITSM 2012.2 and Clientele Portal 2012.2 are 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 for this release are from versions 2010, 2011 and 2012. If you require an upgrade from a version prior to ITSM 2010, please contact your local reseller so he can advise your company on how to plan the upgrade.

4.0 Product Distribution

- Clientele ITSM 2012.2
- Clientele ITSM Portal 2012.2
- Clientele ITSM Mobile 2012.2
- Clientele ITSM Performance 2012.2

These products are released as General Available, 28 September 2012

About Clientele ITSM:

Clientele ITSM provides mid-tier IT departments and managed service providers with a clever and complete software suite which meets all their needs for IT service management. This solution leverages commonly used Microsoft technologies and is pre-configured according to best practices. It enables rapid ITIL/ITSM deployment which reduces implementation costs and TCO, with guaranteed success. Clientele ITSM's customer centric approach makes it easy to use and increases productivity.

Comprehensive reporting, trend analyses and performance intelligence functions complete the full suite, empowering all users with the information they need to excel in their field.

Customers benefit from more than 15 years of agile software 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.

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

About Mproof:

Mproof is an agile software vendor of IT Service Management solutions for the midmarket and managed service providers. From its headquarters in the Netherlands, Mproof supports their worldwide customers with clever software which implements and manages quality services aligned with the needs of their customers. Mproof, a Microsoft Gold Certified ISV, 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.

For more information, please visit www.mproof.com