Release Guide
2013 Spring 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 2013

Table of Contents

1 Introducing Clientele ITSM version 2013.1

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 2013.1 is no exception, delivering new features that offer more configurability and functional capabilities for your business. Clientele ITSM 2013.1 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 2013.1. 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 2013.1 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 2013 release of Clientele ITSM. Here are the objectives and how we've accomplished them:

Objective	Achievement
Compatible with the new wave of Microsoft products.	Clientele ITSM 2013.1, Clientele ITSM Portal 2013.1, Clientele ITSM Mobile 2013.1 and Clientele Performance 2013.1 are updated and made compatible with the following Microsoft products: • Microsoft Windows 8, • Microsoft Windows 2012 Server, • Microsoft SQL Server 2012, • Microsoft Office 2013, • Microsoft Office SharePoint Server 2013 and • Microsoft SharePoint Foundation 2013
Synchronize Clientele ITSM activities with Microsoft Exchange.	A new agent task has been added to Clientele ITSM to manage the synchronization of appointments between MS Exchange and Clientele ITSM. The synchronization supports: • stand-alone appointments, • recurring appointments and • meetings (appointments with multiple attendees).
Deliver high priority customer requested enhancements	Version 2013.1 incorporates the results of customer software change requests (SCR) and reflects real-world feedback on proposed functionality.
Upgrade from 2011, 2012.1 and 2012.2	Version 2013.1 provides upgrade tools from version 2011, 2012.1 and 2012.2.

2 ITSM 2013.1 new features:

2.1 MS Exchange synchronization

A new Microsoft Exchange Synchronization agent task is added to allow you to synchronize appointments between Exchange calendars and ITSM. This synchronization will help you to keep a complete and accurate overview of all appointments in your resources' calendars including appointments planned outside Clientele ITSM to properly plan your operations.

Supported appointments

The Exchange synchronization supports the following type of appointments:

Stand-alone appointments

For each appointment created and updated in MS Exchange or ITSM the data in the following fields will be synchronized:

- Subject
- Location
- Schedule (including time zone information)
- Reminder
- (HTML) Notes

New appointments created by the Exchange synchronization will be related to the context (party) of the assigned user. Appointments with an empty subject, or updated to such in MS Exchange will be defaulted to < Empty > in ITSM. If a synchronized appointment is closed, it will not be synchronized again until it is re-opened. If the appointment Owner in ITSM was changed to a Queue or to a user that will not be synchronized, the Exchange appointment will be deleted after the synchronization has run.

Recurring appointments

Synchronizing recurring appointments also helps you to maintain an accurate view of the resource's availability in case new events are created. The synchronization between ITSM and MS Exchange includes support for recurring appointment series and their changed occurrences.

All day events

An appointment created as or updated to an All-day event in MS Exchange will be converted to a standard appointment with a duration set to 1 day in ITSM. If the appointment schedule is changed in ITSM, it will be synchronized to MS Exchange without the All-day event flag. Otherwise, the All-day event flag remains.

Private appointments

Appointments created as private or updated to private in the Exchange calendar will be synchronized to the ITSM calendar. Private appointments are synchronized using the following business rules:

- The type of the ITSM appointment will be set to 'Private Appointment'.
- The subject of the ITSM appointment will be set to '<Private Appointment>'.

- All fields, except the schedule will be cleared.
- It will not be possible to edit private appointments in the ITSM calendar, meaning private appointments can only be managed from MS Exchange.

Meetings

Meetings with multiple attendees are also supported in ITSM. Appointments which are converted to meetings in MS Exchange (by inviting one or more attendees) will appear as regular appointments in all ITSM calendars corresponding to the attendees. Only accepted or tentative meetings will be synchronized with ITSM, the attendee's meeting requests will not be synchronized with ITSM. If a meeting is synchronized with ITSM and later declined or cancelled, the meeting will be synchronized as a deleted appointment. The other way around, if an attendees meeting is deleted from ITSM it will be synchronized as a declined invitation.

Please refer to the online help (Microsoft Exchange Synchronization Overview) for more information regarding all business logic implemented to support the complete two-way synchronization.

MS Outlook synchronization in combination with the MS Exchange synchronization

Users who currently use the MS Outlook synchronization of Clientele ITSM are strongly advised to disable the synchronization for appointments if they are willing to use the new MS Exchange synchronization. The reason is that enabling both synchronizations will result in a lot of duplicate appointments since both systems generate unique appointments that will be seen as new appointments by the other synchronization.

For task and contact synchronization it is still advised to use the MS Outlook synchronization because these two entities are currently not covered by the MS Exchange synchronization.

Support Microsoft Exchange Server versions

The Microsoft Exchange Synchronization agent task supports Exchange version 2010 and 2013.

2.2 Platform compatibility

Clientele ITSM 2013.1 is updated and tested to be compatible with the new wave of Microsoft products. This latest version of Clientele ITSM now also officially supports the following products:

- Microsoft Windows 8
- Microsoft Windows 2012 Server
- Microsoft SQL Server 2012
- Microsoft Office 2013
- Microsoft Office SharePoint Server 2013 and
- Microsoft SharePoint Foundation 2013
- Microsoft Exchange 2010
- Microsoft Exchange 2013

Besides adding support for newer versions of Microsoft's software, support has been dropped for some older versions. Official support for the following products has been revoked for this version and any newer version of Clientele ITSM:

- Microsoft Windows XP,
- Microsoft Windows Vista,
- Microsoft Windows 2003 Server,
- Microsoft SQL Server 2005,
- Microsoft Office XP,
- Microsoft Office 2003,
- Microsoft Office SharePoint Server 2007 and
- Windows SharePoint Services 3.0.

2.3 Customer requests

With every release of ITSM we try to enhance the product with functional requests and improvements requested by our customer base. In the 2013 spring release we have made changes to several areas of the application. Please find a list of customer enhancement requests realized it this release below.

2.3.1 Date range criteria in Related Activities form

As this functionality already existed for the primary find form and was a much requested enhancement for the Related Activities from, we added the date range criteria on the Related Activities form as well.

2.3.2 Send email option for active sessions (logged in users)

The already existing Active Sessions form in the Admin menu has been enhanced with a “Send E-mail” option. This feature can be used to select the users which are currently active and send them an email. If the related person does not have an email address specified you will be notified.

2.3.3 Support for organizations in the email retriever

An enhancement which was requested was to add support for Organizations to the Support Call retriever. Previously the support call retriever would only check the email address of persons. Now it will also include the email address of an Organization in its search. Please refer to the support call retriever online help for more information on logic.

2.3.4 Manage products from config items tab

Using the Support Call Detail form you will now have the ability to export and manage the list of products in the Config Items tab to the Product management form. This allows you to update all affected CI’s at once.

2.3.5 Asset number added to product generation

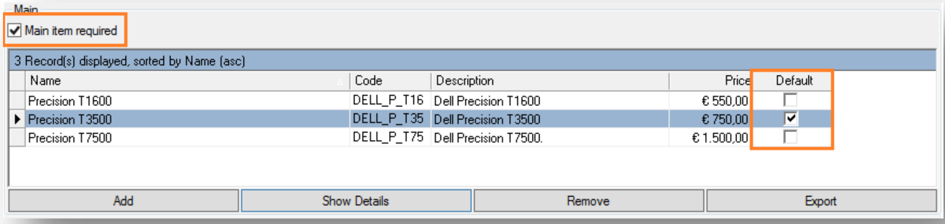
The Asset Number field is added to the Product Generation form. So now you can change the Asset Number directly while processing purchase orders.

2.3.6 Service Catalog enhancements

The service catalog functionality has been updated with a couple of small enhancements to make the process of requesting a service more efficient.

Required fields and default values

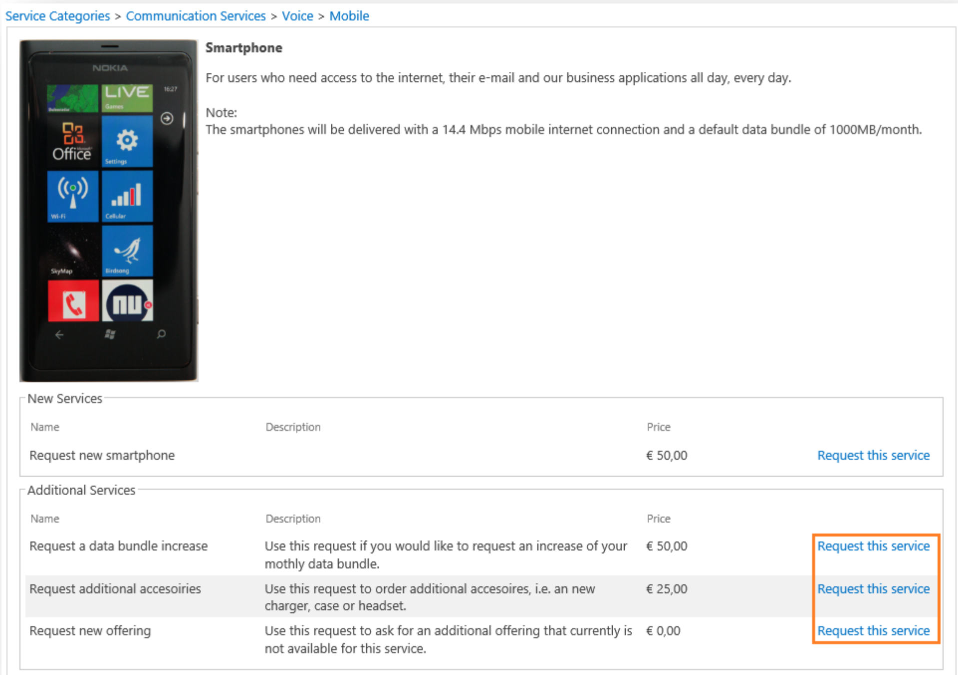
It is now possible to indicate if users are required to fill in a main item and/or service level for their request. If the main item or service level selection is set to be required, the request wizard will show the indicator and it will not be possible to submit the request without selecting one of the items from the list.



The main item and service level grids on the service definition detail forms have also been enhanced with functionality to mark a record as default. The default value will be automatically selected in the request wizard, of course users can still select another item if they desire.

Requesting additional services

In previous versions of Clientele ITSM it was only possible to request an additional offering from the related Services form. In 2013.1 we have added the functionality to the Service Catalog itself. If users already have the selected service associated to them, they can now start the request process from within service detail page (the leave pages of the catalog). If they do not have the selected service yet, the request link for additional services will not be shown.



2.3.7 Ability to relate existing activities to calls

Both from the (new) Activity Management form and the Activity Detail form you will be able to relate activities to existing support call. Please check the online help for a description of the business rules related to the functionality.

2.3.8 Attributes now available for Activities

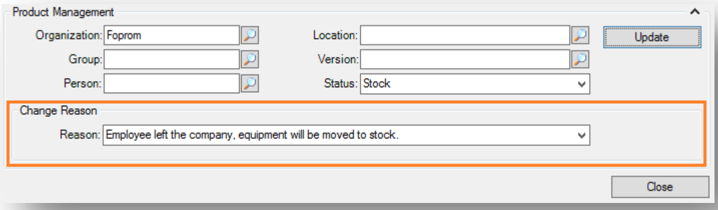
All Activities now have the ability to use attributes on its detail form and the related find form.

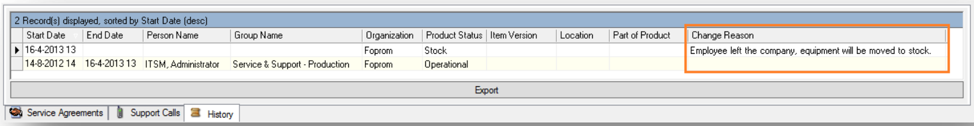
2.3.9 Activity import managers

A new activity import manager is added to import appointments and tasks using the import agent task. It import is limited to stand alone activities, series are not supported.

2.3.10 Change reason added for products update via product management

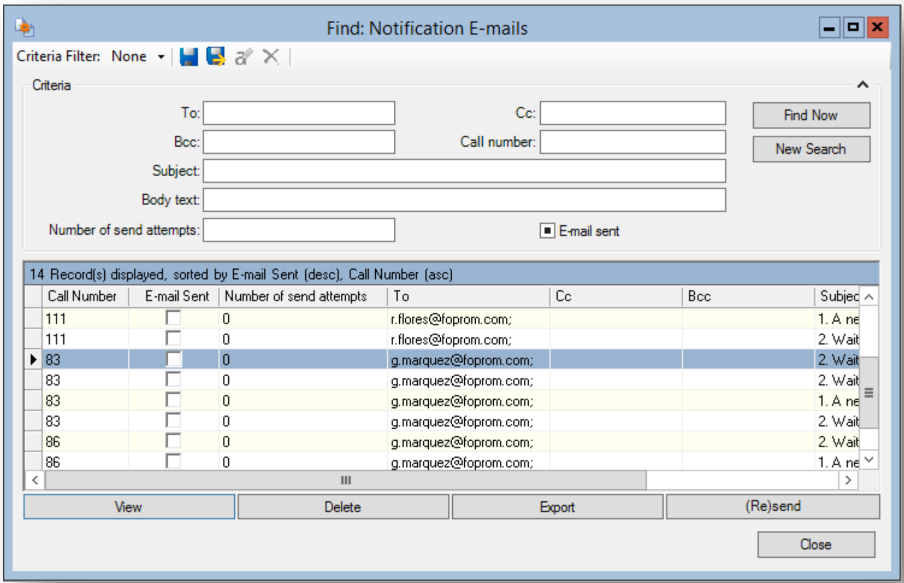
If you want to have the ability to keep track of why a specific mass update was done via the Product Management form we have added the change reason which will record the change reason in the Product Detail History tab.





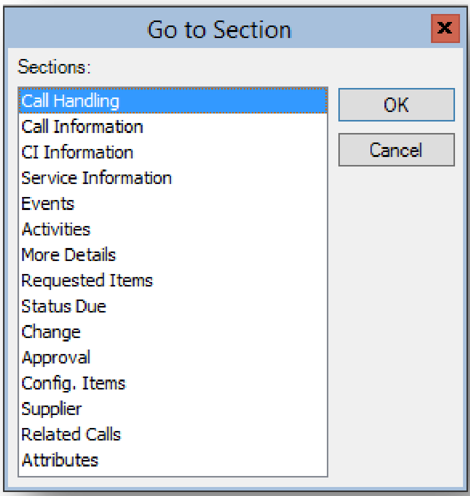
2.3.11 Notification E-mail management

Added to the log section in the Manage menu the administrator will have access to the Notification E-mails. This is a find form which displays the emails sent using the E-mail notification agent. Here you can delete processed emails, access the details of a specific email, resend already sent emails or sent emails which failed to send earlier.



2.3.12 Go to section-menu added to Support Call Detail

We have included a new shortcut which will make navigating the Support Call Detail Form more user friendly. Using CTRL+Y in the Support Call Detail will open a window where you will be able to quickly go to the different sections and tabs in the Support Call Detail Form.



2.3.13 VAT support for quotes

Quotes are updated to support VAT. When creating new quotes the VAT percentages are copied from the items, or the module option if the item has no VAT configured, to the quote items. Like invoices, quotes support multiple VAT percentages per quote. If you use different VAT percentages in a single quote it is not possible to set a discount on quote level. Discount should then be registered per quote item.

2.3.14 Full-text search for Support calls in the portal

In this release we have added Full-text search for support calls in the portal. This allows users to search for support calls based on the contents of events and attachments, similar to the Full-text search for answer book pages.

3 Additional information

3.1 Compatibility

The Clientele products are now compatible with:

- Microsoft Windows 7 [1]
- Microsoft Windows 8 [1]
- Microsoft Windows Server 2008 [1]
- Microsoft Windows Server 2008R2
- Microsoft Windows Server 2012
- Microsoft Office 2007
- Microsoft Office 2010 [1]
- Microsoft Office 2013 [1]
- Microsoft Exchange 2010
- Microsoft Exchange 2013
- Microsoft SharePoint Foundation 2010
- Microsoft Office SharePoint Server 2010
- Microsoft SharePoint Foundation 2013
- Microsoft Office SharePoint Server 2013
- Microsoft SQL Server 2008 [1]
- Microsoft SQL Server 2008R2 [1]
- Microsoft SQL Server 2012 [1]
- Microsoft Visual Studio 2012

1. Both x86 (32 bit) and x64 (64 bit)

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

3.2 Languages

Clientele ITSM 2013.1 and Clientele Portal 2013.1 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 2011, 2012.1 and 2012.2. If you require an upgrade from a version prior to ITSM 2011, please contact your local reseller so he can advise your company on how to plan the upgrade.

4.0 Product Distribution

- Clientele ITSM 2013.1
- Clientele ITSM Portal 2013.1
- Clientele ITSM Mobile 2013.1
- Clientele ITSM Performance 2013.1

These products are released as General Available, April 23 2013

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 Application Development company, 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.