

# Release Guide 2013 Fall Release



Complete. *Not complex*



### **About this Guide**

This manual is provided for informational purposes only. Mproof makes no representations or warranties with respect to the contents of this manual and specifically disclaims any and all implied warranties including, but not limited to, merchantability and fitness for any particular purpose.

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**

© Copyright 2013 Mproof Investments BV. Clientele ITSM is a registered trademark of Mproof Investments B.V. All other trademarks are the property of their respective owners and are acknowledged.

Published in the Netherlands. No part of this publication may be reproduced in any form without the prior written consent of Mproof.

## Table of Contents

<b>Table of Contents</b> .....	<b>3</b>
<b>1 Introducing Clientele ITSM version 2013.2</b> .....	<b>4</b>
1.1 Introduction .....	4
1.2 What is inside .....	4
1.3 ITSM 2013.2 key objectives .....	5
<b>2 ITSM 2013.2 new features:</b> .....	<b>6</b>
2.1 Service Catalog Management Enhancements .....	6
2.2 UI/UX Enhancements .....	9
2.3 Stock .....	11
2.4 RMA Enhancements .....	12
2.5 Customer Requests .....	14
2.6 Clientele ITSM Mobile enhancements .....	15
2.7 Clientele ITSM Performance.....	15
<b>3 Additional information</b> .....	<b>16</b>
3.1 Compatibility .....	16
3.2 Languages .....	16
3.3 Upgrades .....	16
<b>4.0 Product Distribution</b> .....	<b>17</b>

# 1 Introducing Clientele ITSM version 2013.2

## 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 2013.2 is no exception, delivering new features that offer more configurability and functional capabilities for your business. Clientele ITSM 2013.2 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 2013.2. 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 2013.2 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 2013 release of Clientele ITSM. Here are the objectives and how we've accomplished them:

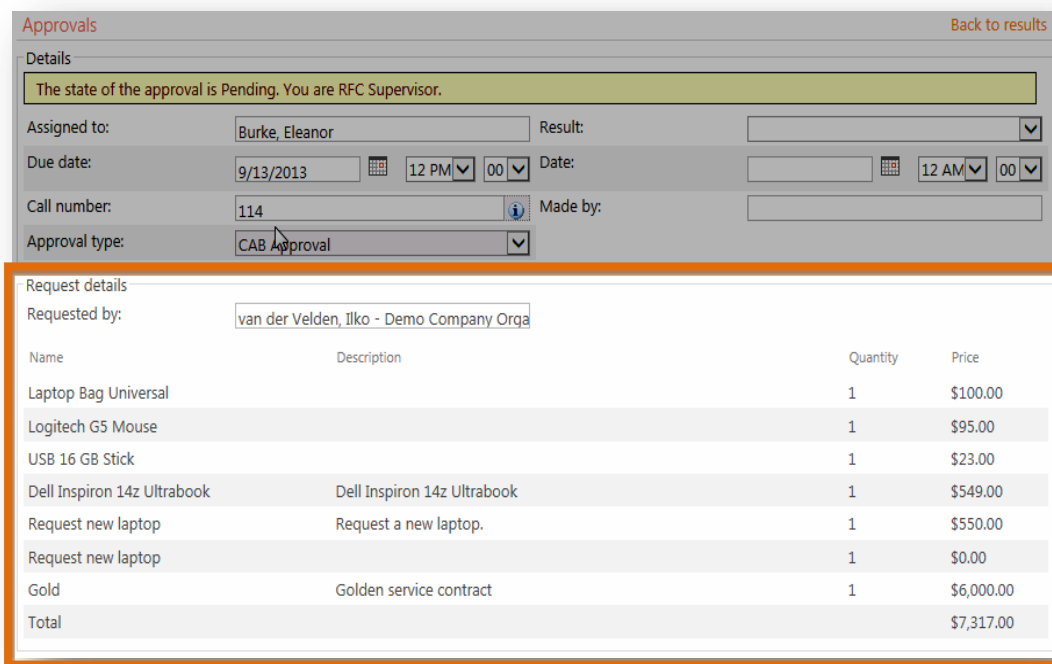
Objective	Achievement
Enhance the service catalog to make it more configurable and accessible.	We added various features to make the service definitions even more configurable. These are some of the features we added; <ul style="list-style-type: none"> <li>• Multiquantity requests.</li> <li>• Additional notifications tags for approvers.</li> <li>• Answer book pages accessible in service definition.</li> <li>• Service definition covered in SLA in a new request.</li> <li>• Ability to set a priority in the service definition.</li> </ul>
Improve the way Clientele ITSM looks and make it more configurable.	<ul style="list-style-type: none"> <li>• The user has the ability to change from floating windows to a tabbed interface.</li> <li>• Themes are now enabled and the user can select which one he wants to use.</li> <li>• We replaced the notes control with a new control which supports embedded images and a spell checker.</li> <li>• Added collapsible panels in the supportcall detail.</li> </ul>
RMA enhancements	<ul style="list-style-type: none"> <li>• Enhanced both the RMA and the RMA Item detail forms so they provide more detail on affected products and products used to replace them.</li> </ul>
Deliver customer requested enhancements	Version 2013.2 incorporates the results of customer software change requests (SCR) and reflects real-world feedback on proposed functionality.
Upgrade from 2012.1, 2012.2 and 2013.1	Version 2013.2 provides upgrade tools from version 2012.1, 2012.2 and 2013.1.

## 2 ITSM 2013.2 new features:

### 2.1 Service Catalog Management Enhancements

#### 2.1.1 Financial overview for approver

In previous versions of Clientele ITSM it was cumbersome for an approver to get additional information about the requested items in an approval record. There was no overview of the costs available to the person that needs to give approval for a request. In ITSM 2013.2 we added a financial overview of the requested items. Also it is now immediately visible who requested the items.



**Approvals** Back to results

**Details**

The state of the approval is Pending. You are RFC Supervisor.

Assigned to:  Result:

Due date:    Date:

Call number:  Made by:

Approval type:

---

**Request details**

Requested by:

Name	Description	Quantity	Price
Laptop Bag Universal		1	\$100.00
Logitech G5 Mouse		1	\$95.00
USB 16 GB Stick		1	\$23.00
Dell Inspiron 14z Ultrabook	Dell Inspiron 14z Ultrabook	1	\$549.00
Request new laptop	Request a new laptop.	1	\$550.00
Request new laptop		1	\$0.00
Gold	Golden service contract	1	\$6,000.00
<b>Total</b>			<b>\$7,317.00</b>

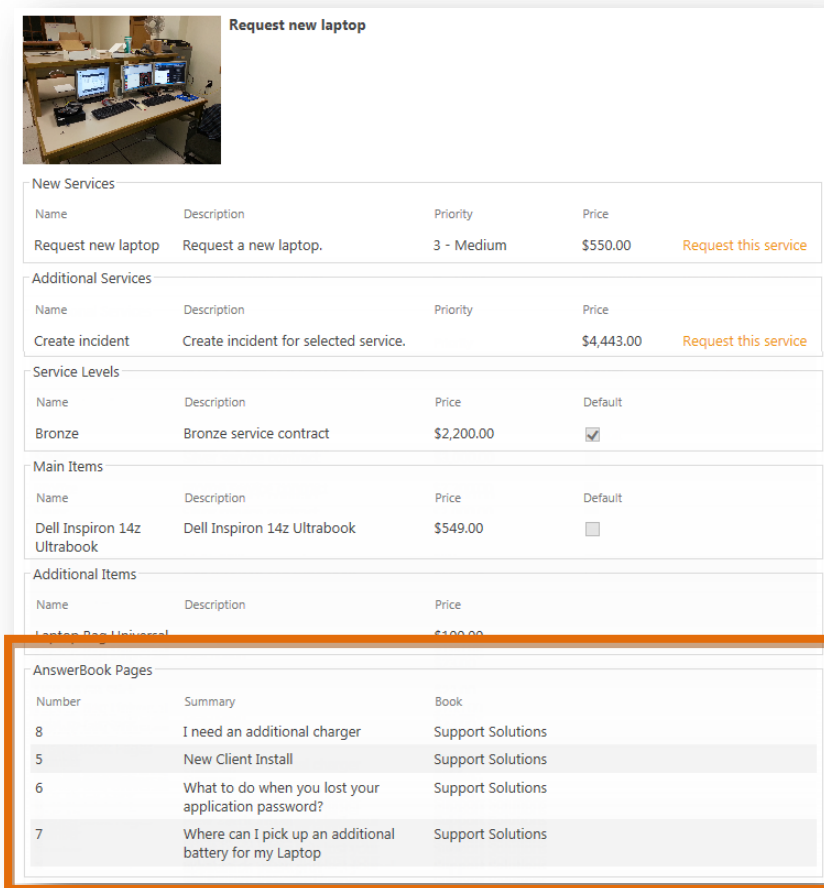
#### 2.1.2 Additional notification tags for CAB and Business approvers

In the ITSM 2012.2 release we added new tags to the Support Call Notification functionality. However we got feedback from the customers that now they were able to directly notify the approver, the approver still had to go to the portal and look for the related approval request. Therefore we added the **[APPROVALSHAREPOINTLINK]**-tag which will link directly to the related approval record.

Also **[SUPPORTCALLCABAPPROVE]** and **[SUPPORTCALLCABREJECT]** have been added to the list of tags. If a notification contains these tags, it will show up as links which can directly approve or reject an approval without first logging into the portal. However this also means that anybody with that link can approve or reject.

### 2.1.3 Answer book pages in service definitions

Answerbook pages can now be added to service definitions. These can be used as a FAQ's to be able to help users even before they need to create an incident. The answerbookpage section will only show up in the service definition when an answerbookpage is actually present. This additional information applies for both the portal as within the client.



**Request new laptop**

New Services

Name	Description	Priority	Price
Request new laptop	Request a new laptop.	3 - Medium	\$550.00 <a href="#">Request this service</a>

Additional Services

Name	Description	Priority	Price
Create incident	Create incident for selected service.		\$4,443.00 <a href="#">Request this service</a>

Service Levels

Name	Description	Price	Default
Bronze	Bronze service contract	\$2,200.00	<input checked="" type="checkbox"/>

Main Items

Name	Description	Price	Default
Dell Inspiron 14z Ultrabook	Dell Inspiron 14z Ultrabook	\$549.00	<input type="checkbox"/>

Additional Items

Name	Description	Price
Laptop Bag Universal		\$100.00

AnswerBook Pages

Number	Summary	Book
8	I need an additional charger	Support Solutions
5	New Client Install	Support Solutions
6	What to do when you lost your application password?	Support Solutions
7	Where can I pick up an additional battery for my Laptop	Support Solutions

### 2.1.4 Creation of additional event made optional

By default an additional event will be added listing the requested items. This has now been made optional by selecting or deselecting the “**Add SupportCall Event**” selection box in the configure offerings section.

### 2.1.5 Service Definitions covered when requesting new service

When the Service Catalog was added to ITSM, a lot of customers eagerly started using it. One of the things missing though was the ability to be able to create a separate service agreement for one or multiple service definitions. This way a specific duration could be set for a particular service request. This functionality is now available in ITSM 2013.2.

### 2.1.6 Ability to provide the priority in the service definition

Another feature which was added, which is directly related to the feature mentioned in 2.1.5. , is the ability to set different priorities for offerings. This way the user will be able to decide for their selves how fast he wants a specific request to be handled.

### 2.1.7 Multiquantity requests

Multiquantity is another enhancement within Clientele ITSM 2013 fall release done within the Service Catalog. It is now possible to request more than one item within a service request.

2 Record(s) displayed, sorted by Name (asc)						
Name	Description	Priority	Price	Approval Needed	Add SupportCall Event	Allow Multi Quantity Requests
Request for mobile phone	Request for mobile phone	2 - High	\$2,233.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
▶ Request for mobile phone	Request for mobile phone	3 - Medium	\$500.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

You can allow multi quantity requests by selecting the “Allow Multi Quantity Requests” checkbox within a service definition. Once selected, a Quantity field will be automatically added to the portal or the client when somebody requests this specific service.

Now when you set the quantity to three for instance, it will create four support calls. One parent support call, which has a complete overview of everything which was requested, and three child calls. The business approver, if there is approval needed, will only get one approval request. By approving or refusing this it will approve or refuse all the child calls as well. If they want to judge the request per Service Request, the approver can select any child call and approve it or reject it.

### 2.1.8 Overview page after requesting a service (Portal only)

After requesting a service using the service catalog and pressing the submit button the user will get three options;

**Proceed with the Service Request details**

Selecting this option will open up the service request details.

**Request this service again**

This option will bring the user back to request this service again.

**Back to service catalog**

This will take the user back to the start screen of the service catalog.



## 2.2 UI/UX Enhancements

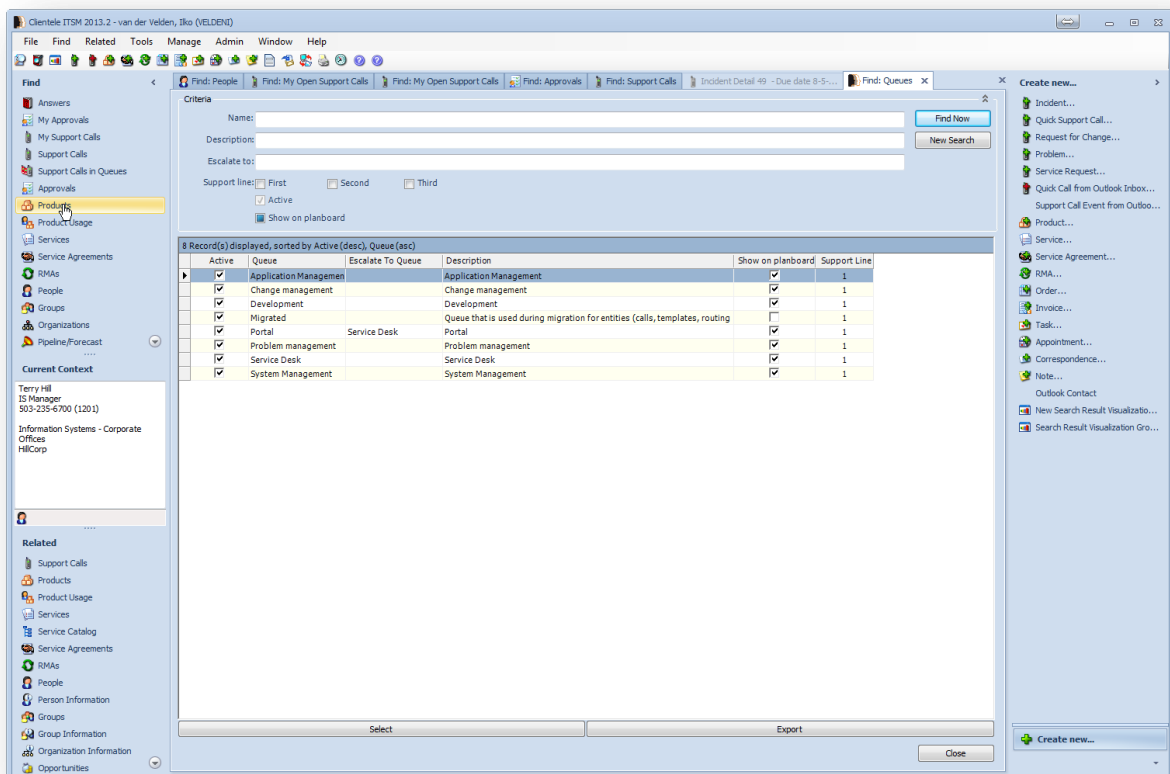
### 2.2.1 Tabbed MDI

Sometimes it can get confusing to navigate through all the open windows within Clientele ITSM. For this reason we added a tabbed interface into Clientele ITSM 2013.2. This can be enabled by selecting the tabbed mode in the window>application window style menu. This option is available for every client and the settings will be stored. Lookup forms opened from the detail forms will cause the detail form to become not selectable. This way the user will know that the lookup form belongs to the greyed out tab.

### 2.2.2 Theming

To give ITSM 2013.2 a more modern look we added the ability to change themes within the client. By selecting the window>theme you will have a list of available themes.

### 2.2.3 Replaced folder items control



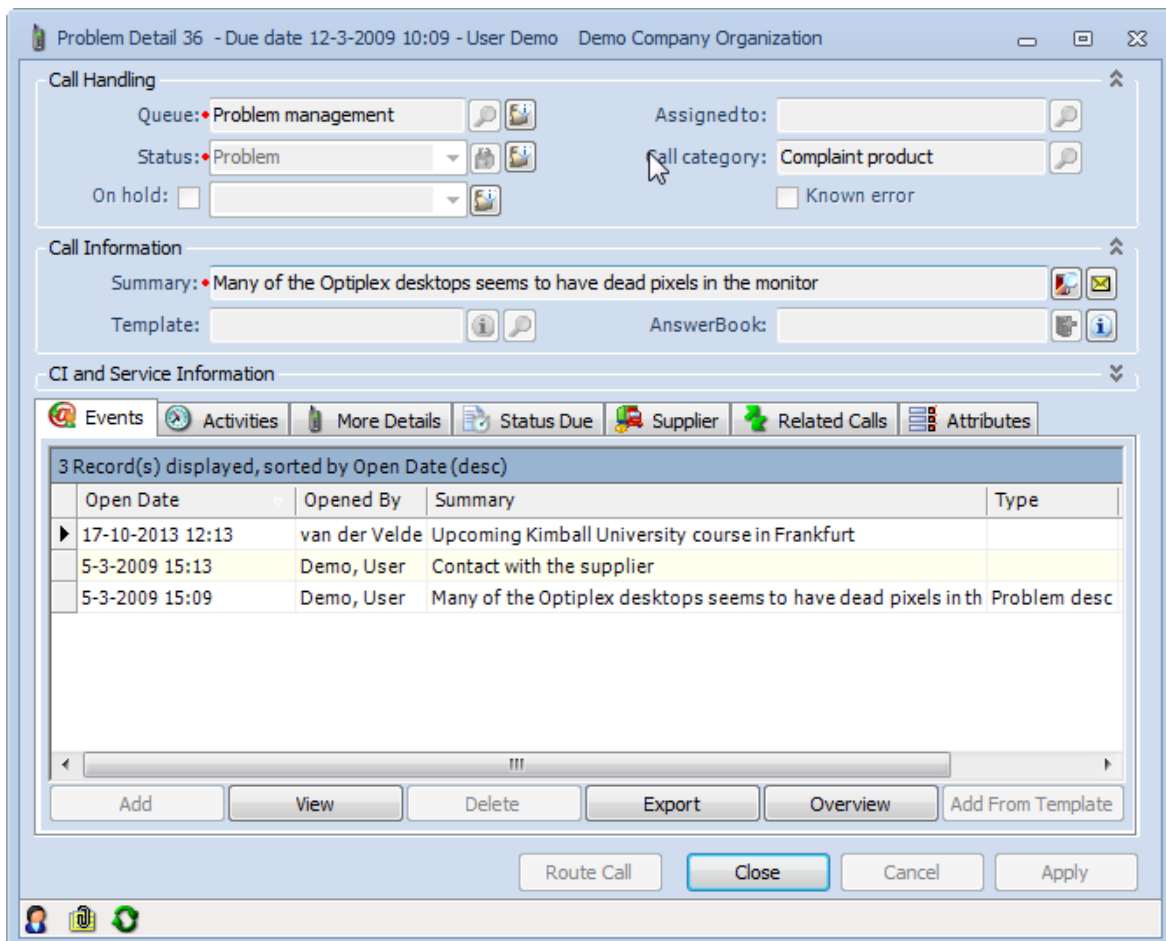
### 2.2.4 New Notes Control

The HTML control has been replaced by a new control which supports embedded images and a spell checker. The following module options have been added to manage its behaviour: SpellCheckCulture, SpellCheckAsYouTypeEnabled and MaximumEmbeddedImageFileSize. The spell checker in ITSM is based on the open source Hunspell spelling checker and is shipped with the following dictionaries: Dutch, English (United States, United Kingdom), French, German, and Spanish. The new control can be found in the following detail forms;

- **Support Call**
- **Support Call Event Template**
- **All Activity Detail forms**
- **Support Call Notification**
- **QuickCall**
- **Support Call Event**
- **Answerbook Page**
- **Product Detail**
- **Support Call Retriever**

### 2.2.5 Collapsible panels in Supportcall

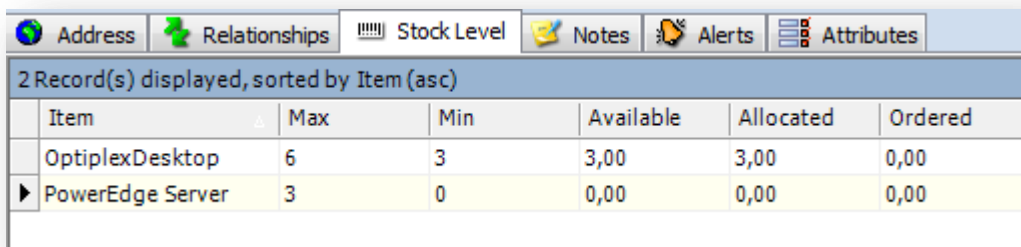
To make the supportcall detail look less complex and to hide fields you may not ever use, we provided the ability to collapse certain regions of the supportcall. In the example below you can see that all CI and Service Information have been collapsed.



## 2.3 Stock

### 2.3.1 Stock in groups and organizations

On the group and organization level we added a new relationship type called “Warehouse”. This relationship indicates that the related group or organization functions as a warehouse. When this relationship is selected, an additional tab will appear called Stock Level. In this tab the user will be able to add items which can be found in this particular warehouse. When a user adds an item, it will have the ability to set the maximum and minimum level of products this warehouse can hold. On the screenshot below you can see that the related warehouse can hold a maximum of 6 Optiplex Desktops and a minimum of three should always be in stock.



Item	Max	Min	Available	Allocated	Ordered
OptiplexDesktop	6	3	3,00	3,00	0,00
PowerEdge Server	3	0	0,00	0,00	0,00

The other three columns are calculated and cannot be manually overridden.

**Available** – the total of available products related to this warehouse with status stock.

**Allocated** – The total of allocated products (see RMA Detail for more information about when a product gets an allocated status.)

**Ordered** – The total amount of products which are currently ordered.

## 2.4 RMA Enhancements

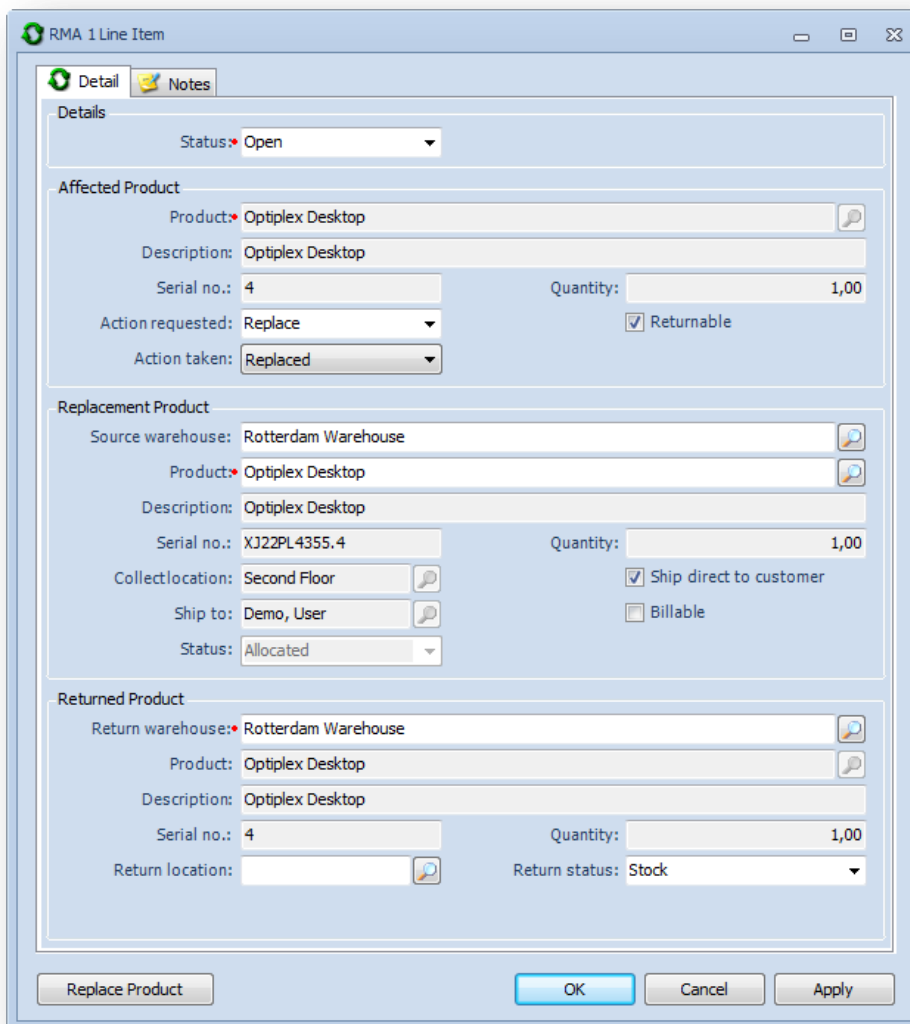
The RMA has been a part of Clientele ITSM for years. However during the years it has not received any enhancements. In ITSM 2013.2 this has changed because of growing demand.

### 2.4.1 Default Warehouse

It is possible now to set a default warehouse for a specific application user. By doing this it will automatically prefill the source warehouse in the RMA Replacement Product Section.

### 2.4.2 RMA

When a user creates a new RMA from a supportcall they will notice a couple of changes within the detail form. First of all, it will automatically copy all products which are linked in the supportcall to the RMA Detail form. Also you will be able to assign an RMA to a specific user and it automatically assigns to the user which creates the RMA. When you open the product listed in the products tab the following detail form will open:



The screenshot shows a software window titled "RMA 1 Line Item" with a "Detail" tab selected. The form is divided into three main sections: "Affected Product", "Replacement Product", and "Returned Product".

- Details:** Status is set to "Open".
- Affected Product:** Product is "Optiplex Desktop", Description is "Optiplex Desktop", Serial no. is "4", and Quantity is "1,00". Action requested is "Replace" and Action taken is "Replaced". A "Returnable" checkbox is checked.
- Replacement Product:** Source warehouse is "Rotterdam Warehouse", Product is "Optiplex Desktop", Description is "Optiplex Desktop", Serial no. is "XJ22PL4355.4", and Quantity is "1,00". Collect location is "Second Floor", Ship to is "Demo, User", and Status is "Allocated". "Ship direct to customer" checkbox is checked, and "Billable" checkbox is unchecked.
- Returned Product:** Return warehouse is "Rotterdam Warehouse", Product is "Optiplex Desktop", Description is "Optiplex Desktop", Serial no. is "4", and Quantity is "1,00". Return location is empty and Return status is "Stock".

At the bottom of the window, there are buttons for "Replace Product", "OK", "Cancel", and "Apply".

The RMA Line Item form has the following three sections.

#### **Affected Product**

The affected product section displays the product which is having issues. The user can select what action is requested to solve the problem and what action was taken to solve the problem. When a user selects *Replaced* as “Action Taken” the Replacement product becomes active. When a user selects the returnable selection box, the Returned product section becomes available.

#### **Replacement Product**

The Source Warehouse which can be found is automatically filled when there is a default warehouse present for the related user. When a user selects a product, they will only be able to select products which have the status stock and are standalone products. Stand-alone products are products which have no child or parent products related to it. As soon as the product is selected its status will change to allocated and the product detail form will become read only. This will prevent other users to alter this product while it is being used in a RMA. When you know that this product needs to be sent directly to the customer you can select the “Ship direct to customer” which automatically fills the “Ship to” field.

#### **Returned Product**

When a product is returnable this section is editable. You will be able to select the warehouse and location where the product will be returned to. Also you will be able to provide a specific status for the product.

#### **2.4.3 RMA Replace Product**

When there is a replacement product available, a user will be able to use the Replace Product button. This will switch the affected product with the replacement product. All relations the affected product had will then be related to the replacement product. The status and location of the replacement product will be updated with the status and location information from the affected product.

## 2.5 Customer Requests

### 2.5.1 Ability to copy agents

In order to be able to quickly setup agent tasks, as an administrator, you will have the possibility now to copy agent tasks. This copy option will be available in the Find: Agent Tasks form. By selecting the agent task you wish to copy and pressing the “Copy” button, it will copy the related task and rename it to “Copy of”.

### 2.5.2 CTRL + P

Printing reports from product, RMA and SupportCall detail forms has been slightly altered. Instead of one report, you now have the ability to select from various reports. The reports that are available in the related detail form are managed through the report type. There were three module options altered or added to support this new functionality; SupportCallDetailReportType, ProductDetailReportType and RMADetailReportType.

### 2.5.3 Added new commands

In the customize Menus, Toolbars and Folder Items (located in the Admin menu) we added two new commands; RunApplication and RunBrowser. For instance by selecting RunBrowser as the command and the ITSM portal URL as the parameter, it will automatically open a browser and the ITSM portal for you when pressed.

### 2.5.4 Order Import

With the information displayed on the stock level tab, the demand for automatic creation of orders also increased. We decided to add an order import in ITSM 2013.2 because of this. You can use the order import, for instance, when the available number of products falls below the minimum amount. When this happens, you can automatically generate an order to order an x amount of products.

We strongly advise to use this import only to create new orders instead of updating existing ones as the order status causes restrictions to which fields are editable. The import supports the following statuses; “Pending”, “Ready to Process” and “Cancelled”.

## 2.6 Clientele ITSM Mobile enhancements

### 2.6.1 Added new links in mobile

Two new links were added in ITSM Mobile. The user is now able to see open activities in queues and open support call in queues.

### 2.6.2 Altered shortcut icon

Previously when a user created a shortcut of ITSM Mobile, it would display one of the mobile pages in the shortcut icon. This has been altered so that it always displays the ITSM Mobile icon.

## 2.7 Clientele ITSM Performance

No new features were added

## 3 Additional information

### 3.1 Compatibility

The Clientele products are compatible with:

- Microsoft Windows 7 <sup>1</sup>
- Microsoft Windows 8 <sup>1</sup>
- Microsoft Windows Server 2008 <sup>1</sup>
- Microsoft Windows Server 2008R2
- Microsoft Windows Server 2012
- Microsoft Office 2007
- Microsoft Office 2010 <sup>1</sup>
- Microsoft Office 2013 <sup>1</sup>
- 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 <sup>1</sup>
- Microsoft SQL Server 2008R2 <sup>1</sup>
- Microsoft SQL Server 2012 <sup>1</sup>
- 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 2013.2 and Clientele Portal 2013.2 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, Brazilian, Danish, Finnish and Portuguese.

### 3.3 Upgrades

The upgrade paths supported for this release are from versions 2012.1, 2012.2 and 2013.1. If you require an upgrade from a version prior to ITSM 2012.1, please contact your local reseller so he can advise your company on how to plan the upgrade.



## 4.0 Product Distribution

- Clientele ITSM 2013.2
- Clientele ITSM Portal 2013.2
- Clientele ITSM Mobile 2013.2
- Clientele ITSM Performance 2013.2

These products are released as General Available, October 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](http://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](http://www.mproof.com).