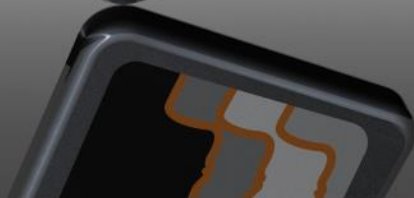


# Release Guide 2014 Spring Release



Complete. *Not complex*



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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.

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# 1 Introducing Clientele ITSM version 2014.1

## 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 2014.1 is no exception, delivering new features that offer more configurability and functional capabilities for your business. Clientele ITSM 2014.1 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 2014.1. 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 2014.1 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 2014 release of Clientele ITSM. Here are the objectives and how we've accomplished them:

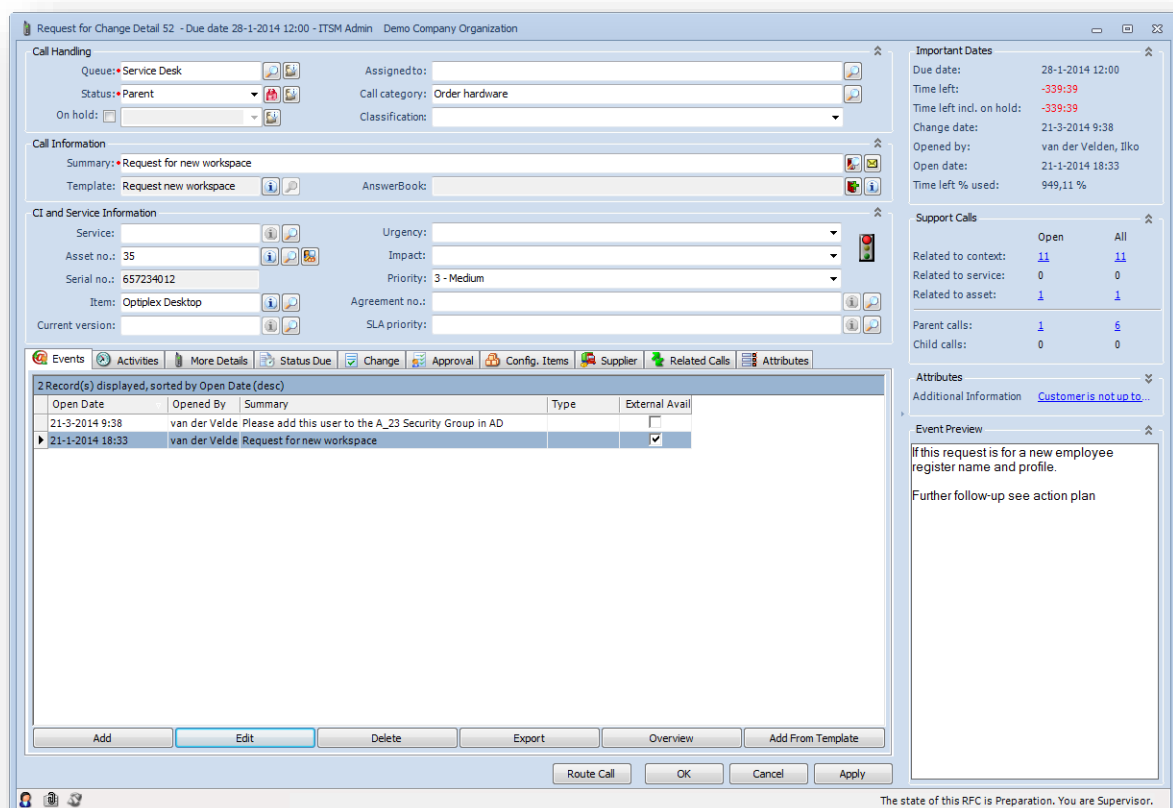
Objective	Achievement
Provide the user with more information which is easier to access in the support call.	To give the user fast and easy access to the most used information we added various information sections. <ul style="list-style-type: none"> <li>• Important Data</li> <li>• Related Support Calls</li> <li>• Related Attributes</li> <li>• Event Preview.</li> </ul>
Make support calls not accessible for users who are not authorized.	Data limitation has been added in support calls to specifically grant or deny users the ability to see specific support calls.
Enhance the user experience for our end users.	We improved loading and response times within the client.
Deliver customer requested enhancements	Version 2014.1 incorporates the results of customer software change requests (SCR) and reflects real-world feedback on proposed functionality.
Upgrade from 2012.2, 2013.1 and 2013.2	Version 2014.1 provides upgrade tools from version 2012.2, 2013.1 and 2013.2.

## 2 ITSM 2014.1 new features:

### 2.1 Support Call Data Information Panel

In order to have the most important information for a user on one screen, inside the support call detail form, we added a collapsible panel containing information on the right of the form. Every section in this panel will be collapsible independently as is the entire panel.

See screenshot below.



#### 2.1.1 Important Data

In the Important Data section, you will have an overview of the most important information for the user. You will be able to see when the call is due but also who opened it and when this call was changed.

#### 2.1.2 Support Calls

In this section you will get an overview of support calls related to the current context, service or asset.

As soon as it has a value, it will be clickable and will immediately open the support call find form showing the actual related calls. By clicking the parent or child calls link, it will take you to the tab related calls.

### **2.1.3 Attributes**

The attributes will show up as soon as it is added to the current support call. Also with a clickable link which results in immediately opening the related attribute detail form. When the related attribute is of the type long text it will also show a preview when you mouse over.

### **2.1.4. Event Preview**

The Event Preview control will only appear once a 2<sup>nd</sup> event has been added to the current support call. By selecting the separate events, it will display the contents of the notes in the event preview.

## 2.2 Support Call Data Limitation

Support Call data limitations have been implemented to segment support calls between departments. The segmentation makes sure department A doesn't see support calls of department B and vice versa. Typical examples are: application management isn't interested in hardware or network related support calls. In Shared Service centres, IT works together with other departments like Facility Management and HR but isn't interested in being "disturbed" by support calls assigned to FM or HR. With the support calls data limitations, all three departments can work in Clientele ITSM without seeing each other's support calls.

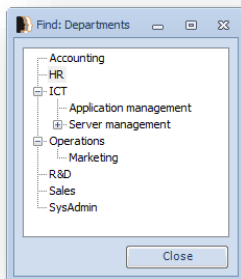
The department has now been added to the support call detail form on the additional information tab. By enabling the data limitation on the application user form, it will limit the data limitation immediately for that specific user.

To enable it go to the application detail form, open the tab data limitations and select the "Apply data limitation for this user". Related data to a support call like attachments will also not be listed for a user which does not have the correct department.

*Note: Reports or custom sql datasources in the dashboard are not affected by the data limitation.*

### 2.2.1 Department overhaul

In order to properly configure the data limitation based on departments, we added a hierarchy to the department find form. See screenshot below.



For instance, when a user belongs to the "Application management" department and the data limitation has been enabled, he can only see those support calls which have the department set to the "Application management" department.

When the user belongs to ICT, there is a different scenario. This user will be able to see all calls underneath the ICT hierarchy that have the departments set as owner.

### 2.2.2 Department on Support Call

The data limitation will only work when you actually set the department in the support call More Details tab. A user which has the data limitation enabled will only be able to see those support calls which have the department set to the department the user belongs to or the departments underneath this department. The user will also see support calls that have no specific department set.

### 2.2.3 Department on various forms

To be able to set the department on a support call detail automatically and support various workflow processes, we added the department on the following forms.



#### *2.2.3.1 Support Call Template*

If you want to immediately set the department for a support call, you can do this by setting the department in the support call template. When applied, it will set the department immediately preventing users who are not allowed to see this to find these calls.

#### *2.2.3.2 Support Call Routing Action*

There is also the ability to automatically set the department using a routing action. For instance when the user wants to dispatch a support call from HR to IT.

#### *2.2.3.3 Support Call Notification*

To be able to notify specific users that a call has set to a specific department you will be able to send an automatically generated email to these users.

## 2.4 Enhanced Clientele ITSM User Experience Enhancements

### 2.4.1 Client performance

The Client Installation and additional download performance has been significantly improved. Because the client now downloads multiple files synchronously, it takes less time for the additional files to complete the download process. The client start up time has been reduced as well.

### 2.4.2 Client forms

All the find forms take less time to show their results; this is most noticeable on the various find support call forms.

Also the newly introduced RTF control (2013.2) takes less time to load in the ITSM 2014.1 version.

### 2.4.3 RTF controls

The old HTML control has been completely replaced by the RTF control.

The service definition description field also has been replaced with the RTF control which allows you to have an even better look and feel of your service catalogue.

## 2.5 Customer Requests

### 2.5.1 Requesting additional services enhancement

In previous ITSM versions, you were only allowed to request an additional service on a service that was already related to you. The problem with this scenario was that you cannot create a request for a printer service that actually belongs to the group or organization you belong to. You have to have this service directly related to you before you could request a new toner for instance. This has been changed in the ITSM 2014.1 version. Now you are allowed to request an additional service as well even though the service is related to a group or organization you belong to.

### 2.5.2 Custom SQL Queries in dashboard grid

Previously a user was only allowed to add a data source to a grid which was based on a find form. The ability to add a grid based on a custom created SQL query has been introduced in the ITSM 2014.1 release.

### 2.5.3 Change and Add date added to the email queue

In order to have more information about emails in your queue, we added the add and change date. This way it is easier to get information about how long a specific email has been in your email queue and when it tried to send the email (change date).

### 2.5.4 New Veda right limiting close and reopen rights

New VEDA rights were introduced to limit the amount of users who are able to close and reopen support calls. Per support call type you will be able to set who is allowed to close and who is allowed to reopen a support call.

### 2.5.5 Enhanced the external required functionality on attributes

In ITSM 2013.2 you could set per attribute that it would be externally required. However this only applied to portal regular users and portal key users. In ITSM 2014.1 we added a module option that sets the behaviour of the selected value in the attribute. The module option called *PortalAttributesRequiredForRoles* determines whether the “portal required” setting for attributes will be applied for all roles or portal roles.

## 2.6 Clientele ITSM Mobile enhancements

No new features were added

## 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 2014.1 and Clientele Portal 2014.1 are currently available or planned for availability in: English US, English UK, Dutch, German, French, Spanish, Chinese Simplified and Chinese Traditional.

### 3.3 Upgrades

The upgrade paths supported for this release are from versions 2012.2, 2013.1 and 2013.2. If you require an upgrade from a version prior to ITSM 2012.2, please contact your local reseller so he can advise your company on how to plan the upgrade.

## 4.0 Product Distribution

- Clientele ITSM 2014.1
- Clientele ITSM Portal 2014.1
- Clientele ITSM Mobile 2014.1
- Clientele ITSM Performance 2014.1

These products are released as General Available, March 28 2014

### **About Mproof:**

For over 15 years, Mproof has provided service management software and services to support service organizations delivering internal as well as external services. The Clientele Software Management platform, is aimed at the Microsoft platform, and is ITIL certified (PinkVERIFY™). The software, available in multiple language versions, is distributed from their headquarters in Wassenaar, Netherlands, through an international network of partners taking care of the marketing, implementation and support. Mproof also offers out of the box implementation for ITSM, FM, Shared Services, Managed Services and self service. Services aimed at the use of the Clientele software, as well as process consultancy, advice, training and gaming are also offered. Mproof is Microsoft a Gold Independent Software Vendor. Find more information at: [www.mproof.nl](http://www.mproof.nl), [www.mproof.com](http://www.mproof.com) and [www.clientele-itsm.com](http://www.clientele-itsm.com).