

Release Guide

2014 Fall Release



Complete. *Not complex*



About this Guide

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Table of Contents

Table of Contents	3
1 Introducing Clientele ITSM version 2014.2	4
1.1 Introduction	4
1.2 What is inside	4
1.3 ITSM 2014.2 key objectives	5
2 ITSM 2014.2 new features:	6
2.1 Auditing Module	6
2.2 Activity enhancements	8
2.3 Customer Requests	11
3 Additional information	13
3.1 Compatibility	13
3.2 Languages	13
3.3 Upgrades	13
4.0 Product Distribution	14

1 Introducing Clientele ITSM version 2014.2

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 2014.2 is no exception, delivering new features that offer more configurability and functional capabilities for your business. Clientele ITSM 2014.2 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 2014.2. 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 2014.2 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 2014.2 release of Clientele ITSM. Here are the objectives and how we have accomplished them:

Objective	Achievement
The ability to track changes made on detail forms.	Audit functionality has been implemented in Clientele ITSM 2014.2. When properly configured you will be able to track changes on the various modules within ITSM.
More flexibility and more functionality in the existing usage and planning of appointments and tasks.	In order to make more effective use of the planboard, a user is now able to copy and split tasks and appointments. Also the ability to add products and or items to a task will help users working with activity to get insight in materials and time used.
Deliver customer requested enhancements	Version 2014.2 incorporates the results of customer software change requests (SCR) and reflects real-world feedback on proposed functionality.
Upgrade from 2013.1, 2013.2 and 2014.1	Version 2014.2 provides upgrade tools from version 2013.1, 2013.2 and 2014.1.

2 ITSM 2014.2 new features:

2.1 Auditing Module

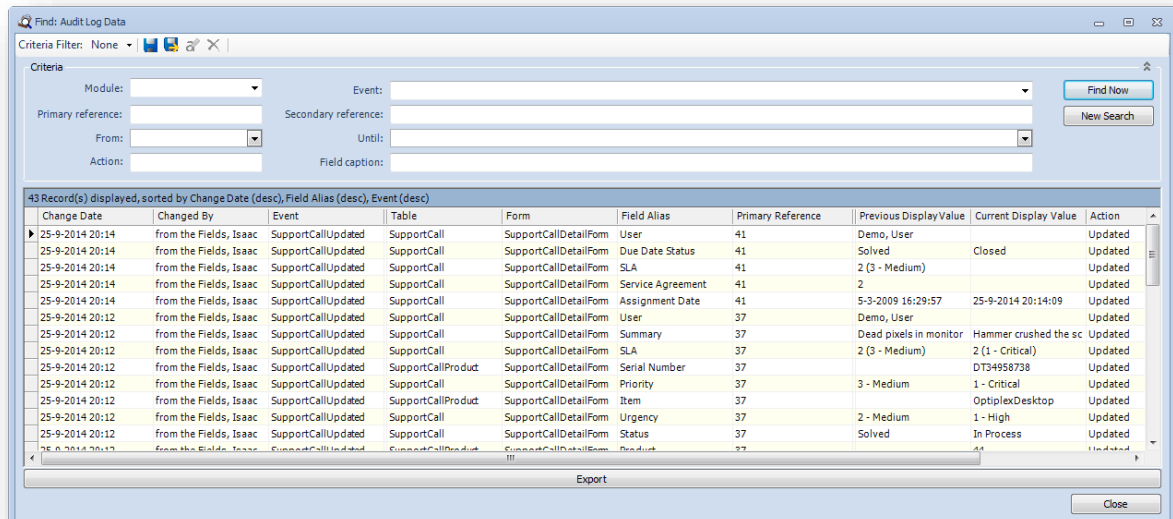
Even though you were able to track history on specific fields within ITSM, there was a need to expand this functionality for administrators. In ITSM 2014.2, it is now possible to track more fields than ever before. Using the audit log functionality will help you to see who changed a record, when it was changed, what the previous value was and what the new value is.

2.1.1 Audit log

The audit log can be accessed through the menu (Manage> Log> Audit Log Data). You will be able to look for specific changes on records you were tracking or for example, look for records which were changed during a specific time period.

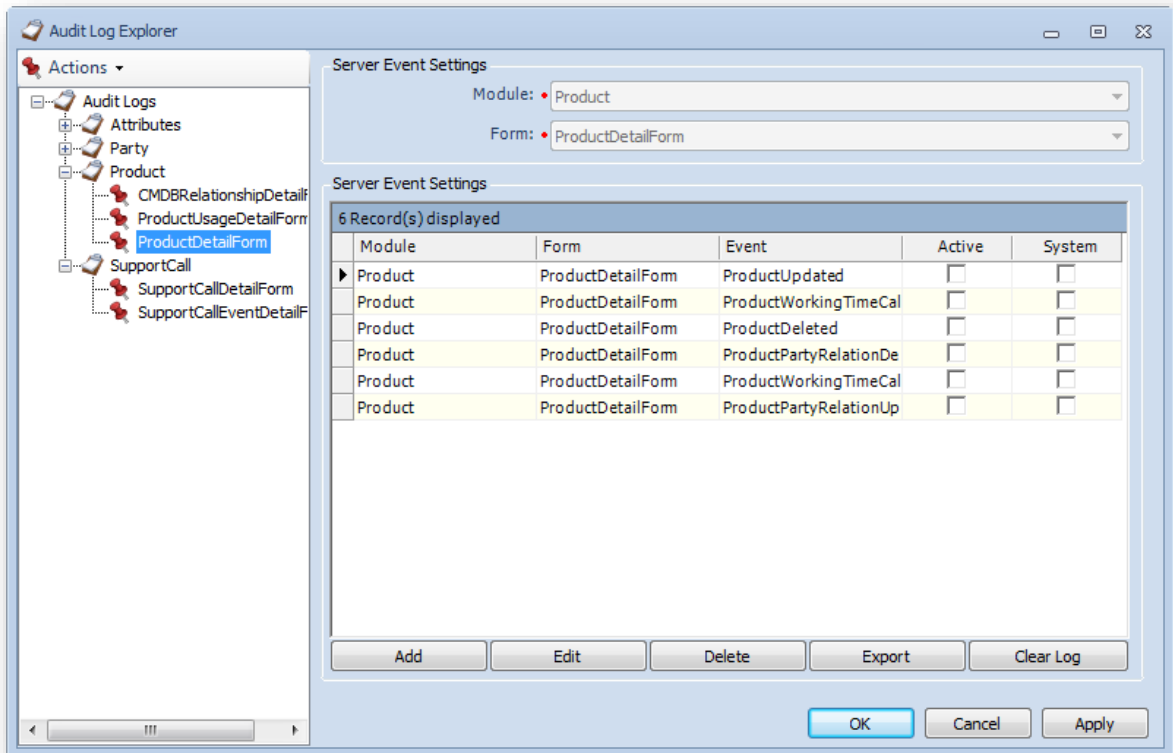
2.1.2 Related audit log

From detail forms, you will have the ability to see the related log data by clicking the right mouse button on the form and selecting the related audit log. This will open a find form which will be limited to the current detail form. This will make navigating to the desired audit log information a lot easier. *See screenshot below.*



2.1.3 Configuring the audit log

The most used forms in Clientele ITSM have already been added in the audit log configuration, however, will be inactive. You can activate them by simply going into the “audit log configuration” under the admin menu. See the help for a complete walkthrough on how to configure the Audit log. Take into account that auditing will take a lot of database space to record every change on a record. For instance, when you track the priority field in a support call and the priority is changed five times, it will add five records. You will have the ability to delete log data from the audit log when the log is taking up too much space by pressing the Clear Log button. See screenshot below.



2.2 Activity enhancements

In ITSM 2014.2, the goal was to add more functionality to the activity module for our customers. We wanted to make it easier for our customers to record materials and time spent on an activity. Also to enhance the planning experience in the planboard, we added the ability to copy and split tasks and appointments.

2.2.1 Copy tasks and appointments

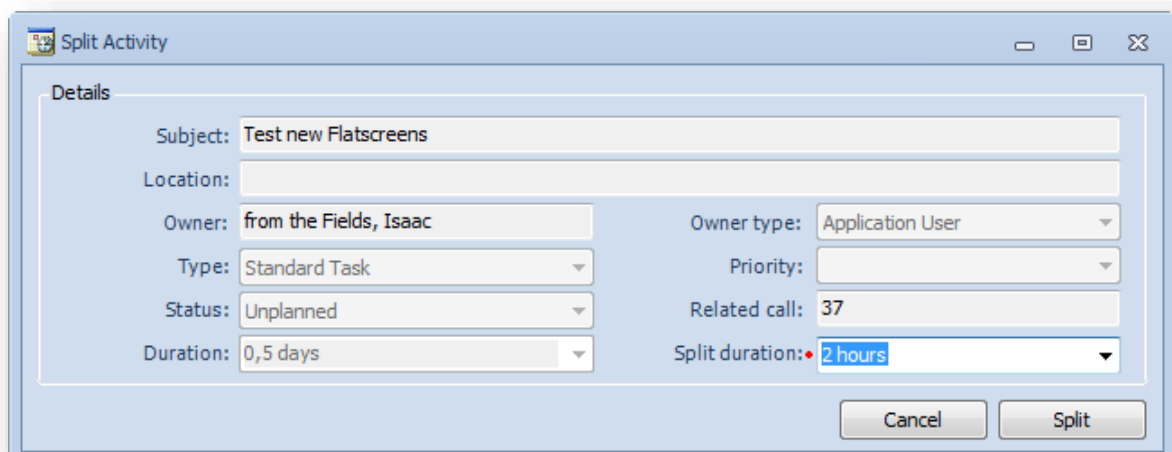
You are able to copy a task or appointment in various ways.

- Using the shortcuts CTRL+C to copy and CTRL+V to paste.
- Right mouse and hold the task or appointment on the planboard and drag it to a new desired location. Release the right mouse button and you will have the option to copy or move it.
- Holding the CTRL key and dragging the task or appointment to a new location. On release, it will be copied automatically.

You are also allowed to copy a task or appointment from Person A to Person B on the planboard.

2.2.2 Split tasks and appointments

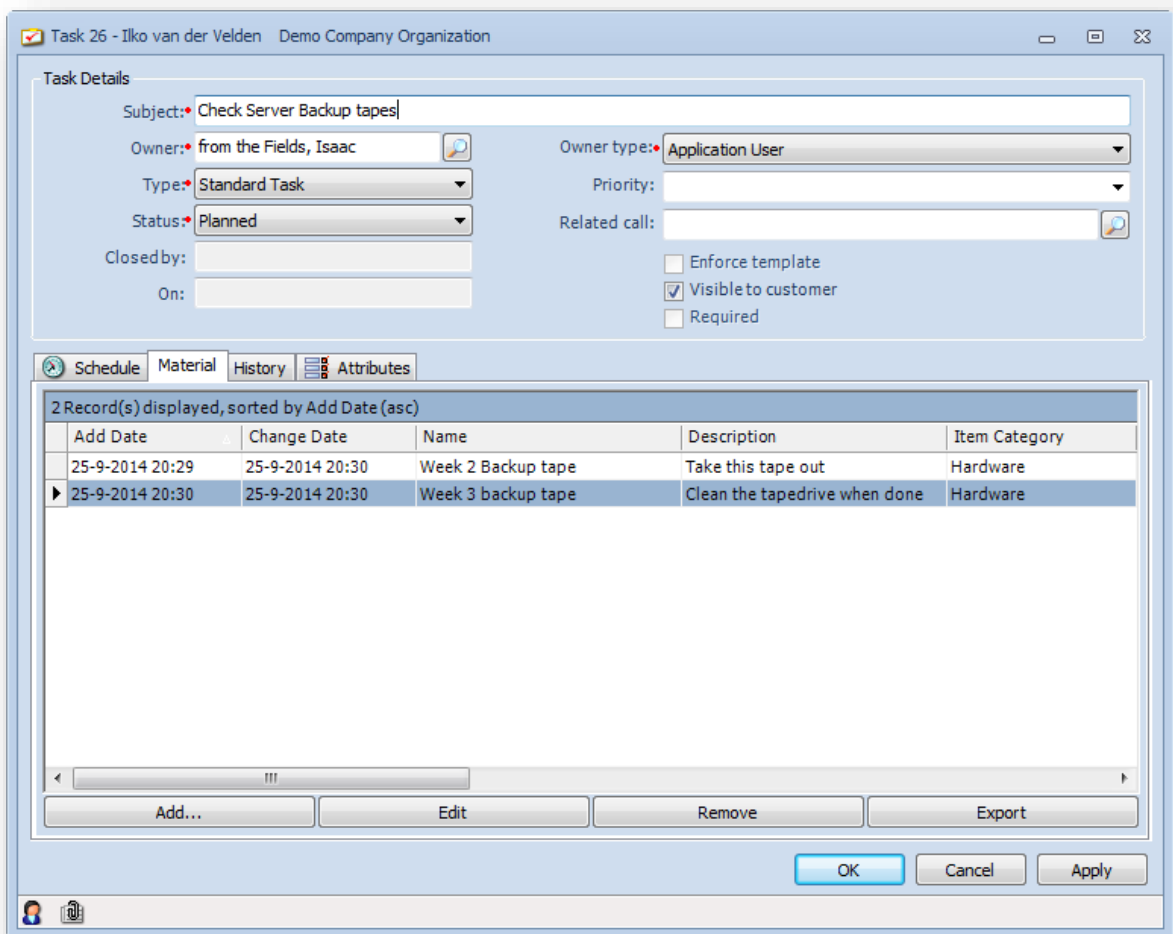
When a user is planning a tasks and/or appointments, he will have to ability to split a task or appointment into smaller plannable tasks or appointments. Take into account that only tasks and appointments which have not yet been planned can be split into smaller parts. You can split a task or appointment by going to the related planboard. Now you can press the right mouse button on the activity or appointment to be planned and select split or press the button on the bottom right. A new window will open up where you can set the “size” of the new tasks or appointments. After this, you can plan the newly created tasks and appointments to the desired location on the planboard. See screenshot below for *Split detail form*.

A screenshot of a software dialog box titled 'Split Activity'. The dialog has a 'Details' section with several input fields and dropdown menus. The fields are: Subject (text input: 'Test new Flatscreens'), Location (text input: empty), Owner (text input: 'from the Fields, Isaac'), Owner type (dropdown: 'Application User'), Type (dropdown: 'Standard Task'), Priority (dropdown: empty), Status (dropdown: 'Unplanned'), Related call (text input: '37'), Duration (dropdown: '0,5 days'), and Split duration (dropdown: '2 hours'). At the bottom right, there are two buttons: 'Cancel' and 'Split'.

2.2.3 New Material tab

In the materials tab, you will be able to select products and items you wish to add to that activity. You can add the same item multiple times, however, you are only allowed to add a specific product once. When you add an item or product, you can open the details of the listed item or product and change values for this specific item or product. Depending on the settings of the item, you will be allowed to change the description, value or unit of measure for example. Note that this is not saved to the actual product or item but is only saved for this particular relation with this activity. You can enable the material tab by going to the related module option called “ActivityMaterialTabPageAvailableForActivityType”.

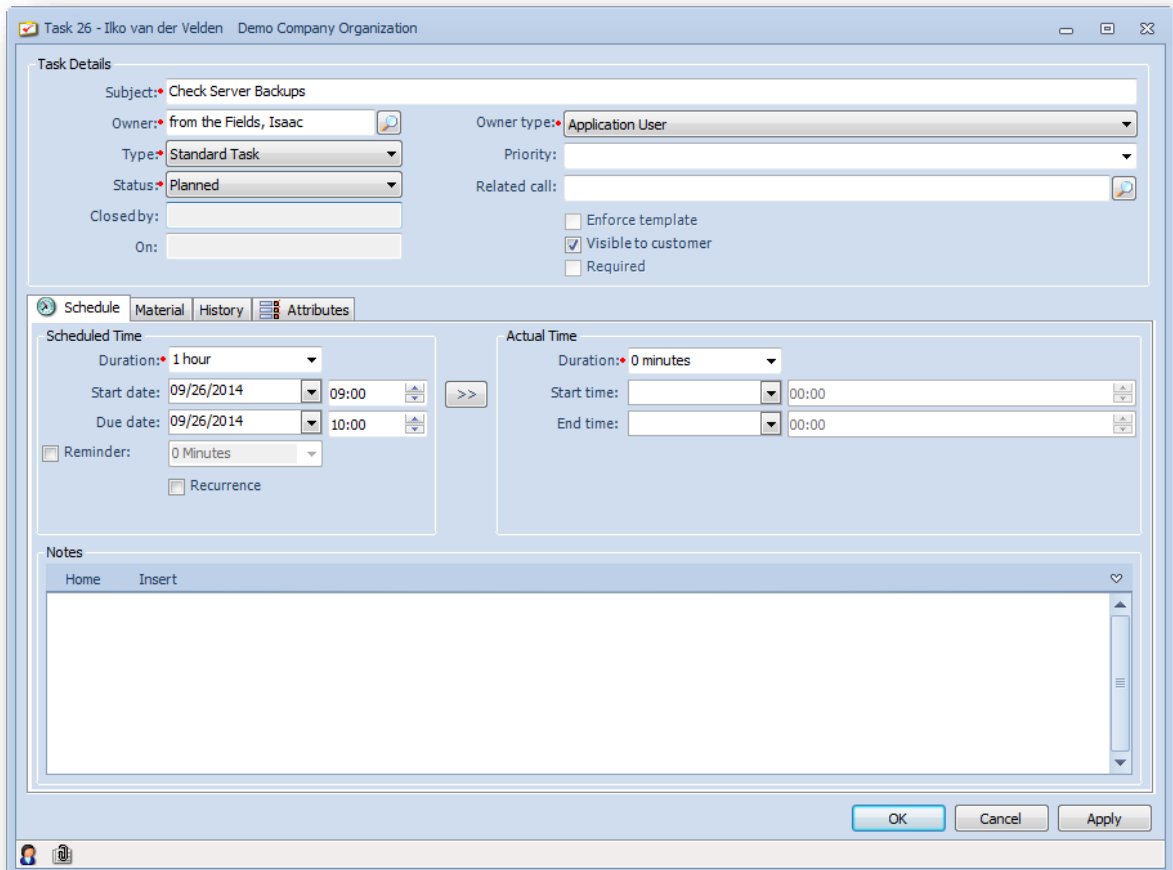
See screenshot below for the Material Tab example.



2.2.4 Actual Time overhaul

In order to be able to be more specific with the actual time used to complete a task or appointment, a new section has been created in the planning tab. Here you will be able to set the actual time it took to complete the task or appointment. You are also able to enter a different start and end date than initially planned. To smoothen the process, we added a button which enables the user to easily copy data from the planned date to the actual time spent.

See screenshot below.



2.3 Customer Requests

In ITSM 2014.2 we added functionality requested by customers.

2.3.1 Product find form enhancements

When trying to edit relations or add relations in a product, it was very cumbersome to find related products because of missing fields in the grid. This made it very hard to find the correct product.

We added columns in the various product find forms to make it more consistent.

- Added Description in product find form
- Added Computer name in Related products find form
- Added Item category, Description and Computer name on the Existing relationships Tab on the Product detail form
- Added Description in Product Details -> Add new Relationship -> Find related product find form

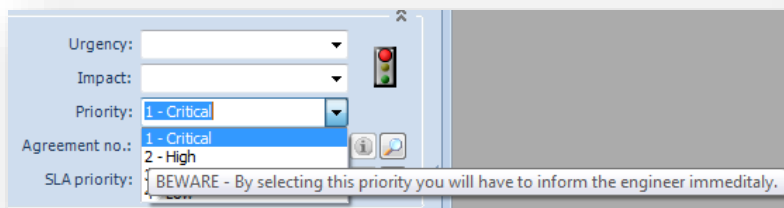
2.3.2 Support call import based on templates

It is now possible to map a specific support call template in the support call import manager.

2.3.3 Tooltips in value lists

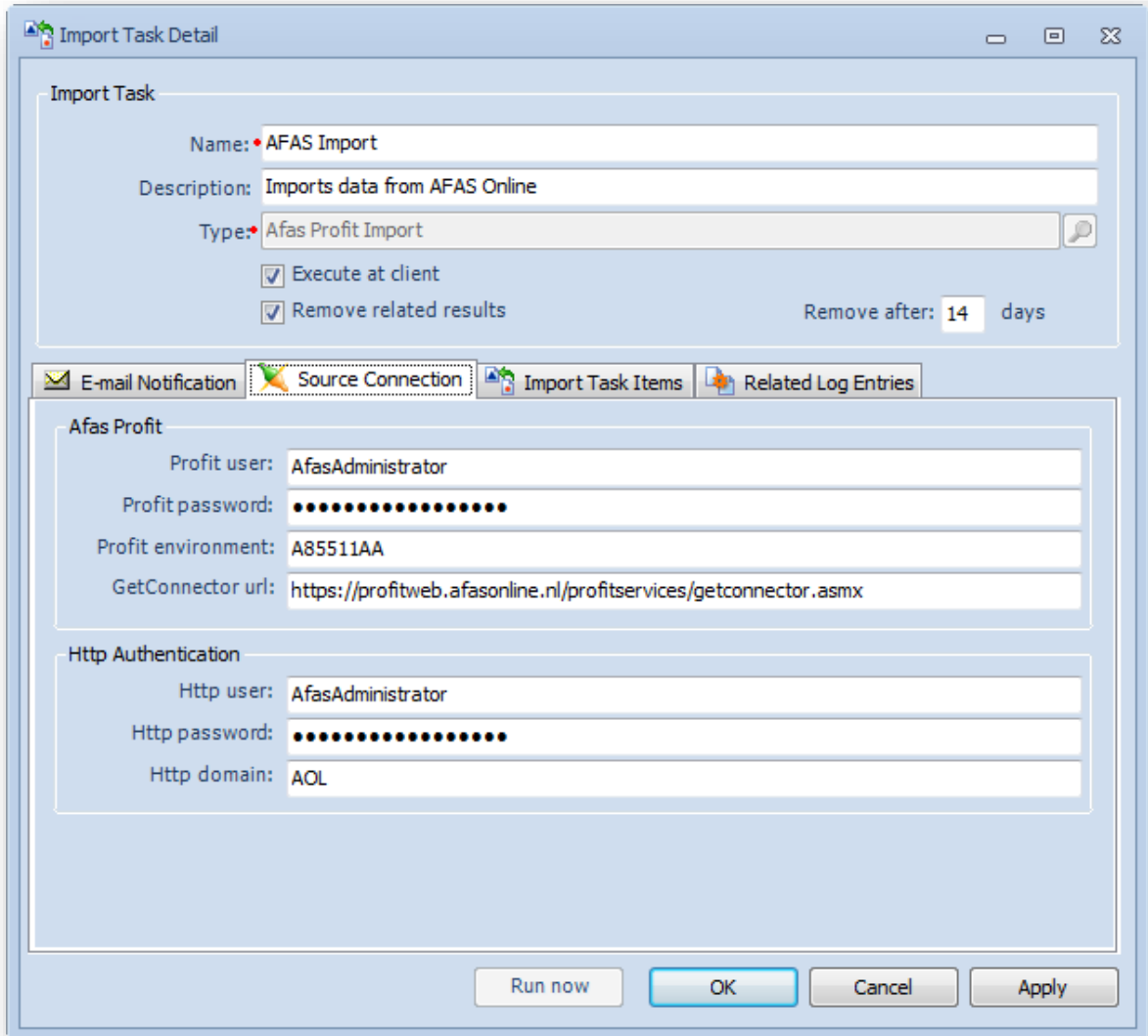
Throughout Clientele ITSM, value lists are used, for example, for priority urgency and impact. Even though you were able to provide the urgency with a description it was almost impossible to see this description for the end user. Therefore we added the ability to enable hovering texts for value lists. This will show the actual description of the related selected value. An administrator can enable or disable this functionality. When the administrator enables it, the user also has the ability to enable it for himself or to disable it.

See screenshot below for an example of the tooltip.



2.3.4 AFAS Profit Integration

2014.2 features a new import type created to connect to an AFAS profit environment. You can configure the new type by adding a new import manager and selecting the AFAS Profit Import type. See the example below for the configuration of an AFAS Profit connection.



2.3.5 Personalized SQL data sources for Dashboards

The SQL Tab allows you to enter a SQL selection query to retrieve data from the selected data source. The custom tag **{ApplicationUserID}** can be used in the WHERE clause of the SQL SELECT statement. When the query runs, it will replace the tag with the Application user ID of the currently logged in user which results in limiting the results.

3 Additional information

3.1 Compatibility

The Clientele products are 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 2014.2 and Clientele Portal 2014.2 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 2013.1, 2013.2 and 2014.1. If you require an upgrade from a version prior to ITSM 2013.1, please contact your local reseller so he can advise your company on how to plan the upgrade.

4.0 Product Distribution

- Clientele ITSM 2014.2
- Clientele ITSM Portal 2014.2
- Clientele ITSM Mobile 2014.2
- Clientele ITSM Performance 2014.2

These products are released as General Available, September 26 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, www.mproof.com and www.clientele-itsm.com.