Release Guide
2015 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.

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1 Introducing Clientele ITSM version 2015.2

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 2015.2 is no exception, delivering new features that offer more configurability and functional capabilities for your business. Clientele ITSM 2015.2 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 2015.2. 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 2015.2 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 2015.2 release of Clientele ITSM. Here are the objectives and how we have accomplished them:

| Objective	Achievement
Compatibility with Microsoft products.	Clientele ITSM 2015.2, Clientele ITSM Portal 2015.2, Clientele ITSM Mobile 2015.2 and Clientele Performance 2015 are updated and are now made compatible with the following Microsoft products: • Microsoft Windows 10, • Microsoft Edge,
Deliver customer requested enhancements	Version 2015.2 incorporates the results of customer software change requests (SCR) and reflects real-world feedback on proposed functionality.
Upgrade from 2014.1, 2014.2 and 2015.1	Version 2015.2 provides upgrade tools from version 2014.1, 2014.2 and 2015.1

2 Clientele ITSM 2015.2 new features:

2.1 Clientele ITSM - Customer Requests

In the ITSM 2015.2 release we have added various enhancements which were requested by customers.

2.1.1   Support call find form enhancements

On the Support call find form we added the ability to filter on a specific Service Agreement making it easier for users to find support calls related to a specific agreement or even find support calls which do not have a service agreement at all. You will also be able to filter on Support calls which currently have a locked service agreement (see 2.1.3 for additional information on locked Service Agreements).
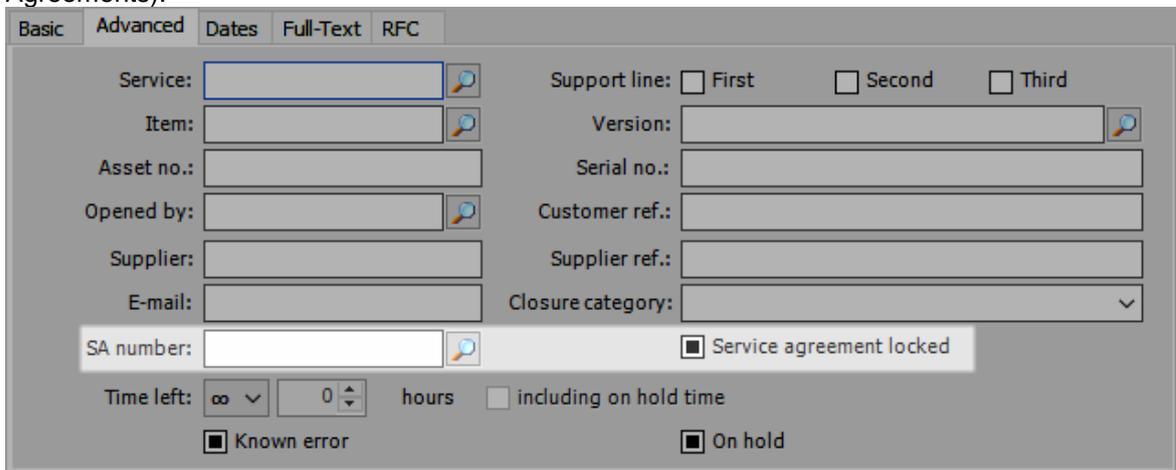
2.1.2   Support Call Detail enhancements

In ITSM 2015.2 it is now possible to select a support call template even if you are working in a support call which has already been saved.
In the past you could only select a support call template when you were adding a support call (meaning it was not already saved). This was very cumbersome for instance when working from a call which was added through the portal or retriever.

We also decided to increase the allowed amount of characters in the summary of a support call and support call event. Sometimes it needed more because of retrieved emails. The summary allows 250 characters now instead of the previous 100.

2.1.3   Support Call Service Agreement lock

We added the logic that once a service agreement is manually selected by the user or on import forcing a specific agreement, the agreement will be locked for that support call. This means that it will not automatically check if there is a service agreement available which might cover that call. You will get a visual indication of a service agreement which is locked for a support call by a lock icon next to the traffic signal icon in a call.
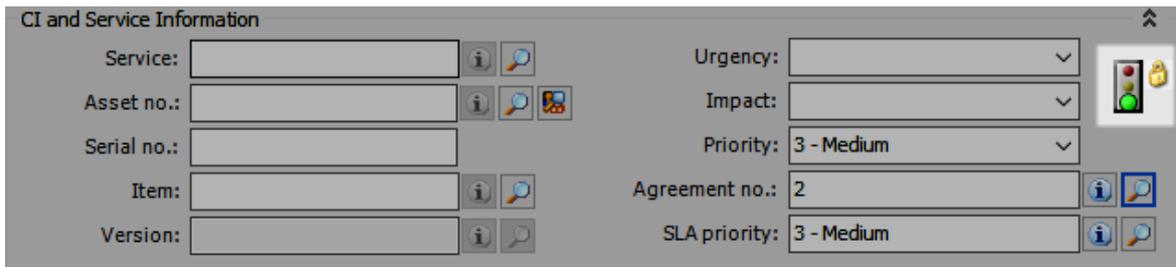
Once you press the traffic signal icon it will automatically check if another service agreement covers that support call better and the lock will be cleared from the screen.

2.1.4   Support Call Retriever

It is now possible to set the call type from the start when it is being retrieved from the support call retriever.
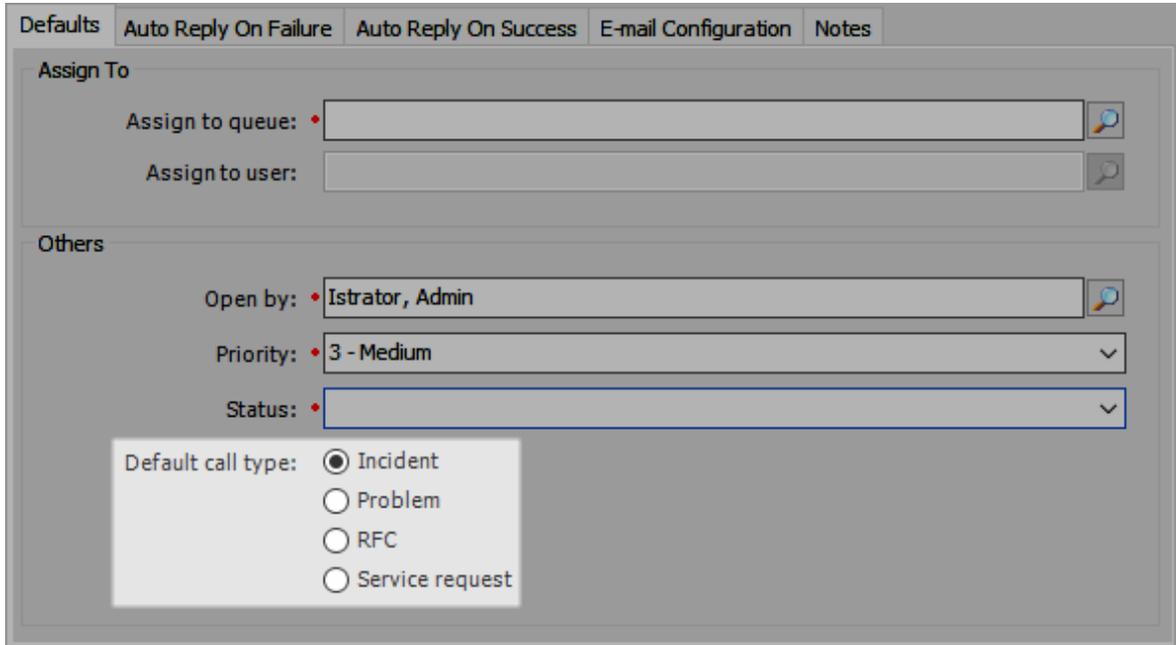
2.1.5   Agent task enhancements

We have added various enhancements to agent tasks.

Active directory Import task

When browsing the active directory tree (in the location configuration window) it was cumbersome because of the limited size of the active directory browser. By adding a splitter you can now manually widen the browsing area.
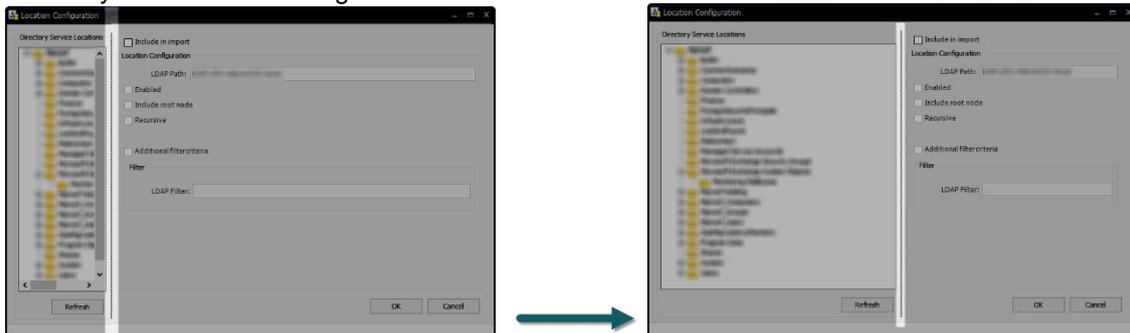
Support Call Import manager

We added the ability to set the on hold flag and the reason in a support call using the import related to support calls. Also services can now be related to support calls using the support call import manager.

Custom Datasources

We already allowed users creating imports. However that usually meant that they needed to know how to connect to a SQL server and which credentials to use. We solved this by allowing imports to use the data sources we already use in dashboards and Crystal Reports.

Another issue we addressed was adding custom data sources. In the past that meant connecting to the ITSM server and adding a data source in the web service configuration utility and running the configuration wizard. This also meant users would get disconnected from ITSM. The data sources were kept in a configuration file which also meant you lost these data sources after you update to a new version of ITSM. Now these sources are stored in the database meaning they will still be present after an upgrade.

Maybe you already noticed that a couple of options are missing in the web service configuration utility. This is because we moved the SSAS database option and the custom data sources option inside the Clientele ITSM client.

Adding data sources

When you log into Clientele as a Clientele administrator you go to **Admin => Data Sources**.
In the window that opens you can press the Add button and the following screen will appear.
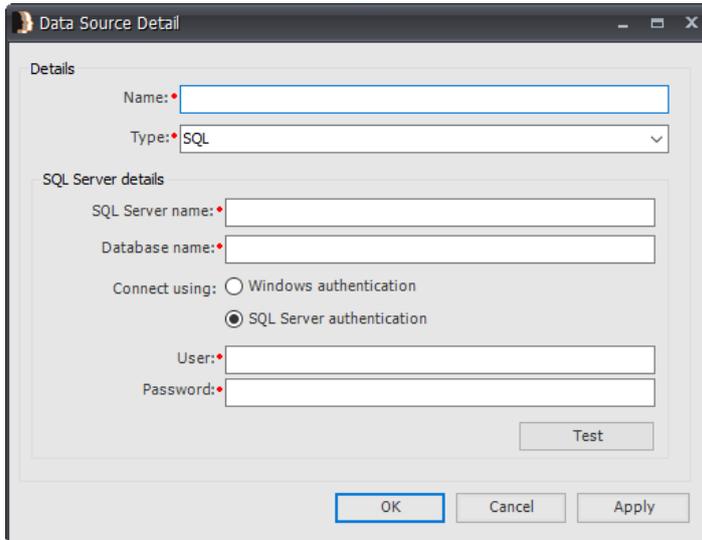
With the type you can select if you are configuring a data source to be used with a SSAS database (to be used with the cube browser) or with a regular SSMS database (to be used with dashboards, reports and now also imports).

After you have successfully added the required information to connect to an external database (the application and system database of ITSM are already added by default), you can use these data sources directly. Its upside is that people that need to write a query for an import can do so without seeing the credentials being used to connect to any database.

Using custom data sources in imports.
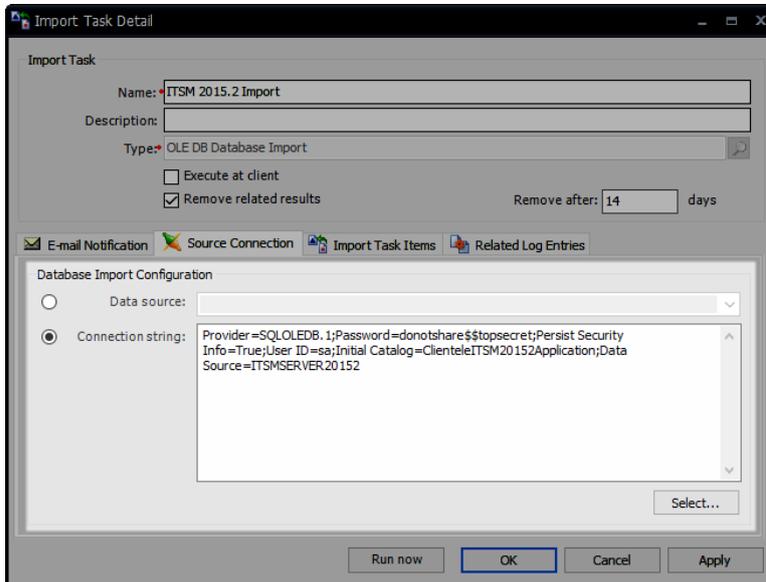
As you can see, you are still able to configure the connections yourself within the import manager. However, information is displayed which may not be meant to be seen by everybody that is allowed to write a query.
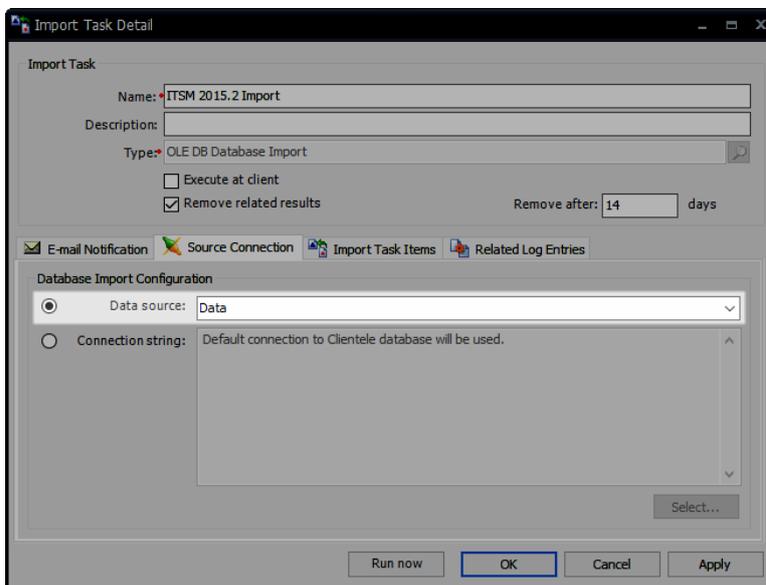
In this example, you can see that any information related to passwords, servers or usernames are no longer displayed. The user can still configure imports and write queries while the database administrator no longer has to worry that he has to share delicate information.

Exchange Synchronization with Exchange online
An often heard request was the ability to synchronize exchange online with Clientele. We have made this possible by adding an option into the already existing exchange synchronization agent task. By selecting the "Use e-mail address for impersonation" option the agent task will work with exchange online environments as well.

2.1.6 Various find form and detail form enhancements

Support call notification detail
We added the option to notify persons which are mentioned in the **CC** of an incoming call as well. Be aware that this option only notifies the **CC'd** persons which were mentioned in the first event of a support call.

Notification E-mails find form
If you were ever wondering who triggered a specific email which was sent to a customer, you can now find this information in the related find form. We added the **application user** who triggered the notification as a search criteria and in the grid itself.

Duplicates find form
Added the ability to filter on E-mail address in the find form. We also added the **active**, **relation number** and the **email address** in the grid so you can more easily compare the records which are found.

Action plan template detail
When configuring task or appointment templates, you can now set the **appointment** or **task type** as well to be used inside the template.

Routing action detail
Newly included in the routing action is the ability to define the **owner** which will be automatically be set when applying the routing action.

Settings and user preferences
After installing an update for Clientele ITSM, sometimes you would lose your user preferences (like grid preferences and selected resources on your planboard) as they were stored locally in the file system. We have decided to move these settings to the database. This will make sure that your preferences are always applied to your session no matter where you start your client. Settings like compression preferences and if you want to remember the last logged in user are <u>not</u> stored in the database. This because these preferences are related to the workstation you are currently working on.

Services detail form
You will now be able to assign and use attributes in a service detail form.

2.2 Clientele ITSM Agent - enhancements

Automatic Agent Updating
In previous versions of ITSM, the agent could not start when the "core files" of ITSM were changed in the client. This has been resolved in 2015.2: the agent will update the core files and start successfully. This means that it is no longer needed to manually start the agent client after an update.

Agent Installation Improvement
The form where you are allowed to enter the user credentials for the agent user, will now also test if that user can actually log in to Clientele and has the correct role assigned to it. In previous versions, only the credentials were checked if these were valid. Once the credentials have been successfully checked, you will now also get asked an additional question. The system will ask you if you would like to start the agent service immediately after the configuration is completed.

3 Additional information

3.1 Compatibility

The Clientele products are compatible with:

- Microsoft Windows 7 [1]
- Microsoft Windows 8 [1]
- Microsoft Windows 8.1 [1]
- Microsoft Windows 10
- Microsoft Windows Server 2008 [1]
- Microsoft Windows Server 2008R2
- Microsoft Windows Server 2012
- Microsoft Windows Server 2012R2
- 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 SQL Server 2014 [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 2015.2 and Clientele Portal 2015.2 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 2014.1, 2014.2 and 2015.1. If you require an upgrade from a version prior to ITSM 2014.1, please contact your local reseller so he can advise your company on how to plan the upgrade.

4.0 Product Distribution

- Clientele ITSM 2015.2
- Clientele ITSM Portal 2015.2
- Clientele ITSM Mobile 2015.2
- Clientele ITSM Performance 2015

These products are released as General Available, September 25 2015

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.