

Release Guide 2016 Spring Release



Complete. *Not complex*



About this Guide

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1 Introducing Clientele ITSM version 2016.1

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 2016.1 is no exception, delivering new features that offer more configurability and functional capabilities for your business. Clientele ITSM 2016.1 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 2016.1. It also provides information about 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 Clientele ITSM 2016.1 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 2016.1 release of Clientele ITSM. Here are the objectives and how we have accomplished them:

Objective	Achievement
Compatibility with new releases of Microsoft products.	<p>Clientele ITSM 2016.1, Clientele ITSM Portal 2016.1, Clientele ITSM Mobile 2016.1 and Clientele Performance 2016 are updated and are now made compatible with the following Microsoft products:</p> <ul style="list-style-type: none"> • Microsoft Windows Server 2016, • Microsoft SQL Server 2016, • Microsoft Exchange 2016, • Microsoft Office 2016 <p><i>Please be aware that even though we have tested Clientele ITSM 2016.1 with the various Microsoft 2016 products, some of them have not been officially released yet. We have tested on technical preview versions of the related products. This means that there is a possibility that functionality can be altered by Microsoft and thus might cause different behavior.</i></p>
Deliver customer requested enhancements	Version 2016.1 incorporates the results of customer software change requests (SCR) and reflects real-world feedback on proposed functionality.
Upgrade from 2014.2, 2015.1 and 2015.2	Version 2016.1 provides upgrade tools from versions 2014.2, 2015.1 and 2015.2.

2 Clientele ITSM 2016.1 new features:

2.1 Support call notification enhancements

We implemented new features for the support call notification. We have added new tags and new triggers to be able to inform users more accurately.

2.1.1 Support call notification tags

New tags have been added in ITSM 2016.1:

- [CALLSUPPLIERNAME]
- [CALLPRODUCT]
- [PRODUCTNAME]
- [PRODUCTSERIALNUMBER]
- [PRODUCTASSETNUMBER]
- [PRODUCTDESCRIPTION]
- [ACTUALCOST]
- [EXPECTEDCOST]
- [SUPPORTCALLAPPROVEURL]
- [SUPPORTCALLREFUSEURL]
- [ATTRIBUTE_<NAME ATTRIBUTE>]

The tags SUPPORTCALLAPPROVEURL and SUPPORTCALLREFUSEURL were added so that users can make their own approve or refuse hyperlink. With the earlier added tags we created the links for the users, however some users wanted the flexibility to make these links on their own.

The ATTRIBUTE_<NAME ATTRIBUTE> can display the values of attributes related to a support call.

2.1.2 Approval anonymous access

When we first added the two tags (SUPPORTCALLAPPROVEURL and SUPPORTCALLREFUSEURL) which gives the user the ability to directly approve or refuse a request, the user was allowed to do this anonymously. This meant that if somebody else would use the link it would apply the judgement made by a random user. As this was not the ideal situation for all of our users we added the module option called "SharepointApprovalAnonymousAccessAllowed". With this option the customer can decide if they will allow their approvers to make judgments without logging in or force them to log in.

2.1.3 Support call notification triggers and filters

Three new controls have been added in the support call notification detail form. In the "Notify When" section we added the "Event is added by internal user" checkbox and the "Caller is related to" lookup control. The "force caller notification" checkbox was added in the "Notify" section.

Event is added by internal user

When this is selected in the notification it will trigger a notification when an internal user (i.e. any user besides the agent, portal or portal key user) adds an event. Be aware that this means it will also notify when the very first event added.

Caller is related to

This is a lookup control which allows users to add an organization. The notification will then only be sent if the caller is related to that organization.

Force caller notification

This can only be selected after selecting the checkbox located before it called “Caller”. This means it will send a notification to the caller even though the caller was the one triggering the notification. In the past Clientele ITSM would not do this. Now you can, for instance, notify a caller that just added a call on the portal informing them the call has been received and picked up by the Service Desk.

2.2 Planboard enhancements

Enable queues on planboard

We added the ability to make queues visible on the planboard. By selecting the “*Show queues available on planboard*” checkbox you will be able to see queues if selected on the resources or queues tab. This way it will be easier to dispatch activities, which have been assigned to a queue, and reassign them to application users.

Setting type of a task or appointment

Even though this was already available after opening tasks or appointments, it could be cumbersome when your primary focus is the planboard. Now you can right click a task or appointment and set the type of the related form in the drop down menu that appears.

2.3 Clientele ITSM 2016.1 - Customer Requests

In the Clientele ITSM 2016.1 release we have added various enhancements which were requested by customers.

Support call - Configurable required controls

It is now possible to configure specific fields which will be required on the Support Call Detail Form. The required fields can be set differently depending on the support call type. Only fields that reside on the main screen of the Support Call Detail Form can be set to “required”. It is not possible to set the fields found on the tabs to “required”.

Please bear in mind that this works for the Clientele ITSM Client only, the portal, for instance, will disregard any required controls you have set up in the Client.


Support call event - Attachment indicator

When there is more than one event in a support call it can become tiresome to find which support call event actually has an attachment added to it. We have added a column in the support call event grid which indicates how many attachments are related to that specific event.

Support call retriever – Department

As more customers are using our data limitation option on support calls, we received requests to be able to set the support call to a specific department when it gets retrieved by email. This feature has been added to the support call retriever configuration screen.

Support call – copy support call number

Copying the support call number has not always been very easy, especially since it was moved. To make things easier the user now has the ability to copy the support call number. We have added a button  on the toolbar which will copy the support call number to the clipboard. It will always copy the support call number of the support call you have opened or selected in a grid.

Import task – copying import task items

There was already the option to copy import tasks. Now it is also possible to copy specific import task items.

Support call – activities

On the support call activities the user can now filter all tasks and appointments listed on one of the following states: All, Unplanned, Open and Closed. The state selection will be stored and retrieved every time you open a call. This filter will be available on the planboard when you opened from the support call. The filter setting will be copied from the support call activities tab.

RMA Line items – information button on product

When opening the RMA Line Item Detail Form there was no easy way to find additional information on the related product. This was solved by adding an information button which will open the detail form of the related product.

Correspondence drag and drop

The e-mail drag and drop has been in Clientele ITSM for quite some time. We have now added the ability to also do this for the correspondence activity.

RunBrowser and RunApplication parameters

We already had the ability to start browsers or applications from custom menu items. Now users will have the ability to run these commands with parameters. These parameters will have the ability to replace the parameter with actual values from Clientele ITSM.

The full list of parameters which a user can use in their custom command is listed here;

- [ContextPhoneNumber]
- [ContextCellPhoneNumber]
- [ContextEmailAddress]
- [PartyID]
- [PersonID]
- [PersonEmailAddress]
- [PersonPhoneNumber]
- [PersonAlternatePhoneNumber]
- [PersonCellPhoneNumber]
- [PersonUserName]
- [PersonRelationNumber]
- [GroupID]
- [GroupPhoneNumber]
- [GroupAlternatePhoneNumber]
- [GroupRelationNumber]
- [OrganizationID]
- [OrganizationEmailAddress]
- [OrganizationPhoneNumber]
- [OrganizationAlternatePhoneNumber]
- [OrganizationRelationNumber]
- [SupportCallID]
- [SupportCallCustomerEmailAddress]
- [SupportCallCustomerPhoneNumber]
- [CurrentID]
- [CurrentIDColumnName]

- [ClienteleServerUrl]
- [ProductNetworkAddress]
- [ProductComputerName]

2.4 Performance improvements

Various performance improvements have been implemented in Clientele ITSM 2016.1. Both server and client side have received several enhancements.

2.5 Newly added module options

A full list of newly added module options can be found here:

SharepointApprovalAnonymousAccessAllowed

Indicates if anonymous access in SharePoint is allowed when performing an approval.

EmailServerRetryAmount

The amount of times a login to an email server (POP3, IMAP, SMTP) must be attempted before throwing an exception.

EmailServerRetryWaitInSeconds

The amount of seconds to wait, after a failed attempt to communicate with an email server.

3 Additional information

3.1 Compatibility

The Clientele 2016.1 products are compatible with:

- Microsoft Windows 7 ¹
- Microsoft Windows 8 ¹
- Microsoft Windows 8.1 ¹
- Microsoft Windows 10 ¹
- Microsoft Windows Server 2008 ¹
- Microsoft Windows Server 2008R2
- Microsoft Windows Server 2012
- Microsoft Windows Server 2012R2
- Microsoft Windows Server 2016
- Microsoft Office 2007
- Microsoft Office 2010 ¹
- Microsoft Office 2013 ¹
- Microsoft Office 2016 ¹
- Microsoft Exchange 2010
- Microsoft Exchange 2013
- Microsoft Exchange 2016
- 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 SQL Server 2016 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 2016.1 and Clientele Portal 2016.1 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 2014.2, 2015.1 and 2015.2. If you require an upgrade from a version prior to ITSM 2014.2, please contact your local reseller so your company can be advised on how to plan the upgrade.

4.0 Product Distribution

- Clientele ITSM 2016.1
- Clientele ITSM Portal 2016.1
- Clientele ITSM Mobile 2016.1
- Clientele ITSM Performance 2016

These products are released as General Available, March 25 2016.

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, The 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.