

Release Guide

2016 Fall Release



Complete. *Not complex*



About this Guide

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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 2016.2

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 2016.2 is no exception, delivering new features that offer more configurability and functional capabilities for your business. Clientele ITSM reflects our fundamental philosophy as a software provider by:

- placing customers at the center 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 2016.2. 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 2016.2 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 2016.2 release of Clientele ITSM. Here are the objectives and how we have accomplished them:

Objective	Achievement
E-mail templates	Clientele ITSM 2016.2 now has the ability to allow users to create e-mail templates. This way you will have the liberty to decide how the emails are set up before sending them from support calls.
Deliver customer requested enhancements	Version 2016.2 incorporates the results of customer software change requests (SCR) and reflects real-world feedback on proposed functionality.

2 Clientele ITSM 2016.2 new features

2.1 Support Call E-mail Templates

To increase flexibility within Clientele we added the ability to use templates when sending e-mails from support calls.

2.1.1 E-mail templates creation

Templates can be created by opening the e-mail templates in the Manage => Support Calls => E-mail Templates menu item.

In the form that appears you will be able to Add, Edit, Delete, Export and Copy E-mail Templates.

When you click on Add, a new form is opened where you can create the template. In this template you can add various (new and existing) tags which will be automatically replaced when you apply the support call e-mail template. For a complete list of all the tags you can use please refer to the Clientele ITSM Help (under "Replacement Tags").

You will have to choose for which type of support calls this template is available and whether it is available for the actual support call and/or for the support call event.

2.1.2 E-mail templates selection

The e-mail button located on the support call detail form and on the support call event detail form has been replaced. 

By pressing the envelope, it will apply the default e-mail template. This default e-mail template can be set up in the module options. Pressing the drop down menu located on the right of the envelope results in a list of all available templates which can be applied to the current situation. If you press the envelope button and there are multiple templates available without a specific default it will show the list of templates as well.

The module options which were added for the default e-mail templates for support calls are:

- *DefaultEmailTemplateForIncident*
- *DefaultEmailTemplateForProblem*
- *DefaultEmailTemplateForRFC*
- *DefaultEmailTemplateForServiceRequest*

The following module options were added for the support call events:

- *DefaultEmailTemplateForSupportCallEventIncident*
- *DefaultEmailTemplateForSupportCallEventProblem*
- *DefaultEmailTemplateForSupportCallEventRFC*
- *DefaultEmailTemplateForSupportCallEventServiceRequest*

The module options are empty by default; they need to be updated with a default email template after upgrading to ITSM 2016.2 for the first time.

2.1.3 Support Call Tags

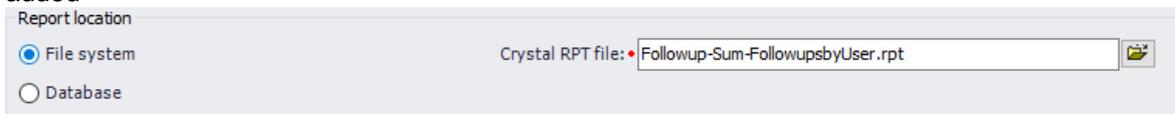
As a result of the new E-mail Templates functionality we added new Support Call Tags which can also be used in support call notifications, event templates and support call templates.

- [CALLEMAILADDRESS]
- [EVENTNOTES]
- [EVENTSUMMARY]
- [ORGANIZATIONEMAILADDRESS]
- [PERSONEMAILADDRESS]
- [CURRENTUSER_ALTERNATEPHONENUMBER]
- [CURRENTUSER_ALTERNATEPHONENUMBERWITHEXTENSION]
- [CURRENTUSER_CELLPHONENUMBER]
- [CURRENTUSER_DEPARTMENT]
- [CURRENTUSER_DISPLAYNAME]
- [CURRENTUSER_EMAILADDRESS]
- [CURRENTUSER_FAXNUMBER]
- [CURRENTUSER_FAXNUMBERWITHEXTENSION]
- [CURRENTUSER_FIRSTNAME]
- [CURRENTUSER_FULLNAMEWITHTITLES]
- [CURRENTUSER_FULLNAMEWITHOUTTITLES]
- [CURRENTUSER_GROUPNAME]
- [CURRENTUSER_INFIX]
- [CURRENTUSER_INITIALS]
- [CURRENTUSER_LASTNAME]
- [CURRENTUSER_ORGANIZATIONNAME]
- [CURRENTUSER_PAGERNUMBER]
- [CURRENTUSER_PAGERNUMBERWITHEXTENSION]
- [CURRENTUSER_PRIMARYPHONENUMBER]
- [CURRENTUSER_PRIMARYPHONENUMBERWITHEXTENSION]
- [CURRENTUSER_SALUTATION]
- [CURRENTUSER_TITLEAFTER]
- [CURRENTUSER_TITLEBEFORE]
- [OUTLOOKSIGNATURE]
- [SKIPOUTLOOKSIGNATURE]

2.2 Reports in database

We added the possibility to store your Crystal report file within the database of Clientele ITSM. This will make it even easier to manage your reports and distribute them. When storing the report, you no longer have to run the configuration wizard to make sure they get distributed amongst the clients. Furthermore, when migrating Clientele ITSM you no longer have to manually copy those reports.

You will notice when you open a report from the manage menu that the following section was added

A screenshot of a software dialog box titled "Report location". It contains two radio buttons: "File system" (which is selected) and "Database". To the right of the radio buttons is a text input field labeled "Crystal RPT file:" containing the text "Followup-Sum-FollowupsbyUser.rpt". There is a small icon to the right of the text field.

Here you can decide to store the report on the file system as it was always stored or upload it to the database.

2.3 Clientele ITSM 2016.2 - Customer Requests

In the Clientele ITSM 2016.2 release we have added various enhancements which were requested by customers.

Support call Notification – Event external available

Since Clientele ITSM 2016.1 you can notify people when an event is added to a support call by an internal user. As of Clientele ITSM 2016.2 you can choose to only notify when that support call event is external available, internal available or to always notify.

Support call event template Tags.

The support call event templates now have the ability to fully utilize the support call tag functionality. This can be very helpful when you want to create a default e-mail for instance. Together with the Support call e-mail templates this is a very powerful helping hand in swiftly sending the correct information in the correct format.

Additional data limitation group

An additional data limitation group was added. This data limitation will NOT show any support call which does not have a department assigned to it. With the previous data limitation, it was still possible to see support calls that were intended for anybody to see if you forgot to put a department in there. With the new data limitation group this is no longer possible.

Added time zones in tasks and appointments.

Time zones have been added to tasks and appointments. This way it is easier to plan with others using Clientele ITSM or tasks and appointments in outlook located in different time zones. These will also be synchronized with exchange if configured.

Exact search

The ability to look for exact values in find forms has been enabled. By using the = sign when searching for a specific value it will only return records that exactly match your search criteria. For instance; typing =Helpdesk in the queue section of a support call find form will only result in support calls which have been assigned to the Helpdesk and not Helpdesk Software or Helpdesk Hardware.

Control updates resulting in new themes and bonus themes

Be aware that due to these upgrades of devexpress (used in the planboard and dashboards) we do not support the use of Sharepoint 2010 anymore).

2.3 Performance improvements

Various performance improvements have been implemented in Clientele ITSM 2016.2. Both server and client side have received several enhancements.

3 Additional information

3.1 Compatibility

The Clientele 2016.2 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 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 2016.2 and Clientele Portal 2016.2 are currently available or planned for availability in: English US, English UK, Dutch, German, French, Spanish, Chinese Simplified and Chinese Traditional.

4.0 Product Distribution

- Clientele ITSM 2016.2
- Clientele ITSM Portal 2016.2
- Clientele ITSM Mobile 2016.2
- Clientele ITSM Performance 2016

These products are released as General Available, September 30th 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.