

# Release Guide 2017 Spring Release

**Clientele**  
*ITSM*

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# 1 Introducing Clientele ITSM version 2017.1

## 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 2017.1 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's inside

This guide covers the features, functionality and technology introduced with Clientele ITSM 2017.1. 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 2017.1 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 2017.1 release of Clientele ITSM. Here are the objectives and how we have accomplished them:

Objective	Achievement
Kanban Board	Clientele ITSM 2017.1 now allows users to use a Kanban Board.
License server	We wanted to make the license server service obsolete to be able to install Clientele ITSM 2017.1 on a load balancing environment.
Deliver customer requested enhancements	Version 2017.1 incorporates the results of customer software change requests (SCR) and reflects real-world feedback on proposed functionality.

## 2 Clientele ITSM 2017.1 new features

### 2.1 Kanban Board

In Clientele ITSM 2017.1 we have added the ability to use a Kanban board to assist you with your daily work.

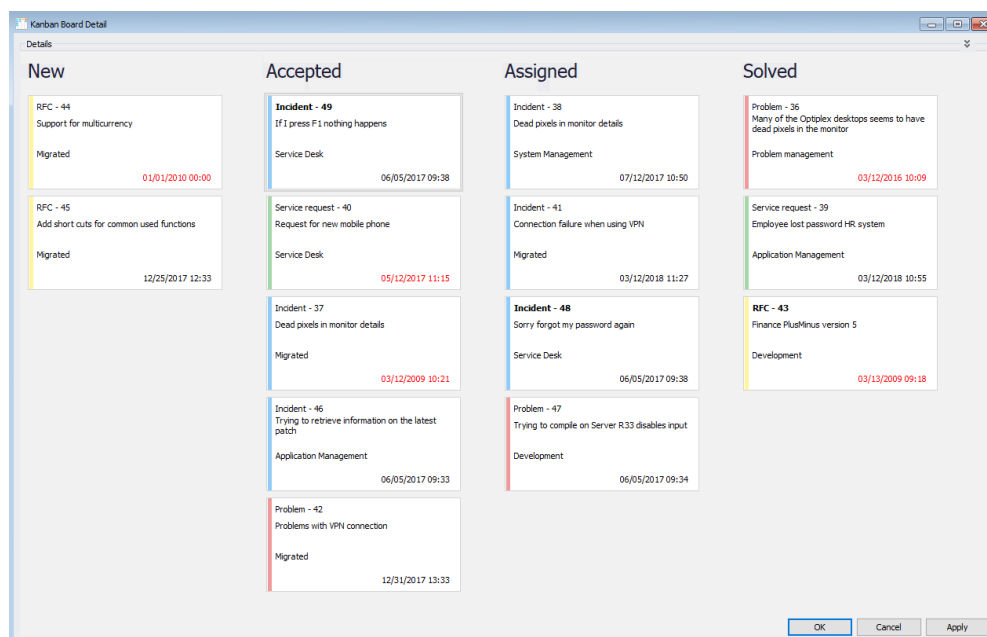
#### 2.1.1 What is a Kanban board

A Kanban board is a tool for providing a visual flow of work to help you manage your process. The board consists of cards (Support calls) combined into groups (columns based on the support call status).

Groups identify workflow stages (statuses), and cards represent workflow items.

A user can move cards within and between columns using drag-and-drop, thus changing the status and order of cards.

*Keep in mind that only support calls will be displayed in the Kanban board and activities are currently not.*



*Kanban board layout*

#### 2.1.2 Creating a new Kanban board

To create a new Kanban board, the following steps should be taken:

##### **Creating the data source**

First, create a data source to be used in your Kanban board. You can do this by using the Support Calls, My Support Calls or the Support Calls in Queues find form and add criteria to get the results. Once you have the requested results, navigate to **Manage>Kanban Boards > add Data Source based on Active Support Call Find Form**.

A new detail form will be opened where the find form results will be converted in a data source for the Kanban board.

### Creating the Kanban Board

After opening the Kanban Board find form (listed in the Kanban Board menu), select the ADD button to start.

Then enter a name to the Kanban board and configure which columns you want displayed in the Kanban board.

### Adding a Kanban board

After selecting the created data source, start selecting the statuses you want to use to group the support calls.

Every status you want to see in your Kanban board must be selected in the multiselect control called "group by support call statuses".

When you have provided your Kanban board with a name you can save it. Multiple Kanban Boards can be saved. If you want the current Kanban board to be the default board, you must select the default check box located at the bottom of the form. Only one Kanban board can be your default board.

Be aware that all support call statuses are listed in the "group by support call statuses". It is therefore possible that you will see a status that belongs to problems even though the data source only displays incidents.

If you still select a status that belongs to a problem, it will be displayed in the Kanban board. However, it is not possible to drag a card (support call) in that column as the Incident does not have that status.

*\*only open statuses are displayed on the Kanban board.*

### The 'Other' column

When a selection of statuses like new, assigned and in process are in your Kanban Board and in your data source, support calls with a status "solved", will automatically create an additional column called "Other". Here all support calls will be displayed that are not part of the statuses selected in the configuration of the Kanban board.

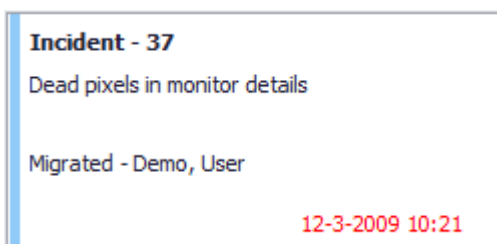
In short, the "Other" column will only be displayed if the data source contains calls with a status which is not listed in the Kanban board.

## 2.1.3 the Kanban Board Cards

Displayed on the Kanban Board are the cards which you will be able to drag. On the cards the following information is displayed:

- Support call type and its number
- The summary
- The queue assignment and application user
- The due date of the call

The colors on the left are a visual indication of the support call type as well. These colors cannot be altered.



## 2.2 License server

The license server is the core of Clientele ITSM and needs to be running continuously or it will not be possible to use Clientele ITSM. It is also not possible to configure Clientele ITSM with the “always on” and “load balancing” setups provided by Microsoft. However in Clientele ITSM 2017.1 we have removed the traditional license server (no service will be running from now on).

The removal of the license server enabled the use of the functionality listed below.

### 2.2.1 Session History

Active users and users that were already logged in are now added into a database table, so these tables can now be queried. With the Session History Find form, you can see who logged in and when.

*The Session History Find Form can be found in the Admin menu.*

### 2.2.2 Active Sessions Find Form

The Active Session Find form has been updated as well. You are now able to see if someone is logged in through the portal or the client. You will also be able to see the IP address of the incoming connection.

## 2.3 Clientele ITSM client update service

Since the first release of Clientele ITSM, the client has been regularly updated., but administrator privileges were required to install an update. Hence, the update service was introduced, which runs on the client machine with the ability to update the client without the user having to provide administrator privileges when updating Clientele ITSM.

## 2.4 Clientele ITSM 2017.1 - Customer Requests

### **Support call notification adjustments**

We have added a TAG so the closure category can be displayed in the notification. This also works in the email templates introduced in ITSM 2016.2.

Also, we added a notification trigger which can be used to notify the related supplier of a support call.

### **Tags in CC and BCC in Email templates**

With new functionality comes new requests. This also applies to the email templates. We received a lot of positive feedback on the new functionality but had not yet enabled the use of TAGS in the CC and BCC fields of the templates.

This has now been added.

### **Portal supplier reference has been added to the Portal**

We added the possibility to look for supplier reference on the support call find form in the portal.



**Services inactive**

We added the ability to make services inactive and active again. The related find forms have been enhanced to filter on this newly added field as well.

**Batch key size**

Customers were running into issues with the 50-character limitation of the batch key in the import. This has now been increased to 250 characters.

**Updates to the support call find form;**

We added three columns to the support call find form grid:

- **Time Left Until Next Status** displays how much time you will have left to reach the next status defined in your Service Level agreement
- **The time left until next status including on hold**
- **The time left until next status name**

**Item Category in Product Usage**

Users were unable to look for a specific item category in the product usage find form. This has been added in the ITSM 2017.1 release

**Copy a visualization component**

It is now possible to copy a visualization component. By selecting the visualization component and pressing copy. It will also ask if you want to keep using the same data source of the original visualization it is using.

## 2.5 Performance improvements

**Performance in Support Call Find form**

Alterations to the support call list have been made to improve the performance of the support call find forms. Due to this performance enhancement, the find form is almost twice as fast.

## 3 Additional information

### 3.1 Compatibility

The Clientele ITSM 2017.1 products are compatible with:

- Microsoft Windows 7 <sup>1</sup>
- Microsoft Windows 8 <sup>1</sup>
- Microsoft Windows 8.1 <sup>1</sup>
- Microsoft Windows 10 <sup>1</sup>
- Microsoft Windows Server 2008 <sup>1</sup>
- Microsoft Windows Server 2008R2
- Microsoft Windows Server 2012
- Microsoft Windows Server 2012R2
- Microsoft Windows Server 2016
- Microsoft Office 2007
- Microsoft Office 2010 <sup>1</sup>
- Microsoft Office 2013 <sup>1</sup>
- Microsoft Office 2016 <sup>1</sup>
- Microsoft Exchange 2010
- Microsoft Exchange 2013
- Microsoft Exchange 2016
- 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 SQL Server 2014 <sup>1</sup>
- Microsoft SQL Server 2016 <sup>1</sup>
- Microsoft Visual Studio 2012

<sup>1</sup>. 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 2017.1 and Clientele Portal 2017.1 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 2017.1
- Clientele ITSM Portal 2017.1
- Clientele ITSM Mobile 2017.1
- Clientele ITSM Performance 2017

These products are released as General Available, May 31st 2017.

### **About Mproof:**

For 20 years, Mproof has provided service management software and services to support service organizations delivering internal as well as external services. The Clientele ITSM 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 ITSM 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) and [www.mproof.com](http://www.mproof.com).