

Template tool

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Apply a Template

1. When creating the new case, click on the **Template button**.
2. In the *Case Template* window, select the template and click on the **Export button**.
The fields: *Urgency, Title and Description* in the case creation form will be filled with the information saved in the template.



Activate the **Other user** check box to view the templates created by other advisors.

When applying the template the *category* can be completed if it has been saved in the template, but in the new case the category is required to be selected again for SLA/Model recalculation.

Case templates ✕

Import

+

From other users

Title

Template for K

General templ:

Description

HW incidents template

This templates applies for general inci

Export Edit Delete

Export Edit Delete

Create a Template

1. Create a template during the case creation and Urgency, Title and Description fields are filled.
2. Click on the **Template** button, the template editor window will open.
In the *Import case* window, click on the **Import** button to save the information previously entered in the case creation form. Complete the following information:

Public:
Shows the template to other advisors

Enable:
Enable/disable the template

Edit/Delete Template

Only the advisor who created the template can edit/delete the template.

1. *To edit*, select the template and click on the **Edit** button, you can edit: Title, Description and the boxes for activation and publication.
2. *To delete*, select the template and click on the **Delete** button.

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