

ServiceDesk Plus Masterclass 2023

S2E1: Crafting dynamic templates in ServiceDesk Plus

ServiceDesk Plus enables you to configure scenario-based templates that pre-populate or dynamically modify information based on end-user input. Templates ensure accuracy in capturing relevant information, simplify processes, and save time by automating repetitive processes.

You can configure templates for-

- Incidents
- Service requests
- Changes
- Projects
- Releases
- Tasks
- Replies
- Resolutions

Functionalities

Data pre-population: You can configure templates to pre-populate necessary fields within forms used for collecting information across different processes. This functionality is available across all templates.

Layout design: You can design the layout of the forms by adding, removing, or relocating fields and sections. You can design custom layouts using incident templates, service templates, change templates, and release templates.

Customized views: Request forms can be customized based on whether a requester or a technician accesses the forms. You can configure layout-level customization as well as field-level visibility. This customization is available for incident templates and service templates.

Automations:

Field and Form Rules: Using field and form rules, you can perform various dynamic modifications based on form events. You can create rules to update fields, show/hide fields, enable/disable fields, mandate fields, etc. You can configure field and form rules for incident templates, service templates, and change templates.

Other automation: Depending on the template, you can automate certain repetitive processes like adding tasks, configuring approvals, configuring SLA, etc. The following is the list of processes that can be automated when configuring different templates:

Capabilities	Availability
Associating tasks	<ul style="list-style-type: none">• Incident templates• Service templates• Project templates
Configuring approvals	<ul style="list-style-type: none">• Incident templates• Service templates
Associating SLAs	<ul style="list-style-type: none">• Service templates
Configuring checklists	<ul style="list-style-type: none">• Incident templates• Service templates
Configuring template actions	<ul style="list-style-type: none">• Service templates
Associating life cycles	<ul style="list-style-type: none">• Incident templates• Service templates
Associating workflows	<ul style="list-style-type: none">• Change templates• Release templates
Assigning roles	<ul style="list-style-type: none">• Change templates• Release templates
Adding members and milestones	<ul style="list-style-type: none">• Project templates

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www.servicedeskplus.com

our [what's new](#) page.

If you'd like a free consultation to learn how you can leverage these various features, write to us at itsmcares@manageengine.com.

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- We'll send you a \$25 Amazon gift card once your review is approved by Gartner.

For more information on ServiceDesk Plus, please check out the following resources.

Help documentation		Community		Other resources
On-premises	Cloud	On-premises	Cloud	Help videos