

# ServiceDesk Plus Masterclass 2022

## Design and Create Dynamic Templates with ServiceDesk Plus

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

You can configure templates for incident requests, service requests, change requests, release requests, projects, tasks, resolutions, and replies.

### Functionalities

**Data Pre-population:** You can configure templates to pre-populate necessary fields within forms that are used to create or edit various records. 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.

**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.

**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:

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

If you need a free consultation to learn how you can leverage the various features and functionalities of ServiceDesk Plus, write to us at [itsmcares@manageengine.com](mailto:itsmcares@manageengine.com). For more information on ServiceDesk Plus, please check out the following resources.

<b>Help Documentation</b>	<b>Community</b>	<b>Other Resources</b>
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<a href="#">On-premises</a>	<a href="#">Cloud</a>	<a href="#">On-premises</a>	<a href="#">Cloud</a>	<a href="#">Help Videos</a>
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