

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:

Automation	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

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

Help Documentation	Community	Other Resources
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On-premises	Cloud	On-premises	Cloud	Help Videos
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