## Quick ways to create a case

- Create from an existing case
- Create from a Template

#### Create from an existing case

- 1. Log into the ITHelpCenter portal. From the main menu, select *Case Management > Console*. In the console tool panel, on the right side of the screen, click on the button Create complex **Case**. A new window will open to search in the list of recorded cases.
- 2. Search for a case by criteria such as: Case number, source, category, status, priority, sla, owner, handler, end-user, etc.

Or select from the complete list of cases:

ase search	CI se	arch	_ Select a Colu enter a key v	imn and in the ord to search	text field				Permissions
🗆 All		Columns	CATEGORY	<b>ч ч</b> рг	rint		Search		
						20 🗸	Go		Create New CAT
IDSDCASE	SOURCE	MODEL	SERVICE	SLA	ISMAYOR	CATEGORY	CATEGORY_DETAIL	5	Import Itink Case
3	PERSON	General Inci	Incident	General Inci	false	Printing Service\Web	Incident	Ir	C Link case
33	PERSON	General Pro	Problem	General Pro	false	IT Service\Printing	Problem	Ir	
34	PERSON	General Inci	Incident	General Inci	false	IT Service\Printing	Incident	Ir	
35	PERSON	General Req	Request fulfil	General Req	false	IT Service\Printing	Request	Ir	
36	PERSON	General Req	Request fulfil	General Req	false	IT Service\Printing	Request	Ir	
37	PERSON	Request for	Request for	General Req	false	IT Service\Printing	Change	Ir	
2	PERSON	General Inci	Incident	General Inci	false	Printing Service\Web	Incident	Ir	
32	PERSON	General Inci	Incident	General Inci	false	IT Service\Printing	Incident	Ir	

- 3. Select a record and click on Create New Cat to open the case creation form. Additional options:
  - Import: With this option, the fields: Urgency, Category, Detail, SLA/Model, Impact, Priority, Title and Description in the case creation form will be filled with the same information of the selected case.
  - Link Case: With this option, the window for adding relations with other cases will open before the case creation form:

Selected case and its Category will be pre selected.

#### Fill in the fields:

# **Relationship type:** to define the type of relationship and enter the **Title(Subject)** and **Description** of the relationship between cases.

See How to use link tool

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Import and Link Case enabled:

Select Case:	3 Web printing service not working Selected case	e 🔍
Category:	Printing Service\Web printing\Unknown/Incident	
Relationship type:	This case is part of	~
Title:		
I can't print		
Description:		,
	ag aftar last undata	

Click on **Accept** button to save. A window with the relationship will open. If necessary, select the relationship to edit or create a new relationship.

						20	~	Go	1	Edit	
ld SD case relation	Relations type name	ld SD case	Relations title	Relations description	MT title model	Category	Category name	Case Status	ld § cas rela typ	Delete	
16	This case is	3	I can't print	Printing servi	General Inci	Printing Serv	Incident	InProgress	1	Add	
4									۴	View	

Once the relationships are created, the form to create a new case will open. Complete or edit the case info and clic on **Add case** button.

	Со	mplete t	he fol	lowing	g form	
		Cas	e numbe	er: 43		
Select user: Add	Select an complete/e create cas	User and edit info to e				
Urgency: Is major:						
Medium			►			
Select Categ	ory					_
Category: Printing Service\Web printing\Unknown\ <incident></incident>						Add
Details:	Incide	nt				
Id MD SLA	SLA name	Model	Calendar	Max time	Normal time	Model Description
1	General Incidents	General Incident	Default	480	120	The main objective i
4						L. L
Description	~					
Description	1					
Impact:			Pri	ority:		
Low V Iow						~
Title: 🗆						
Web printir	ng service not wor	king				
Description:	Π					
Web printin	ng service not wor	king. I canno't use	the service			
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### Apply a Template

See How to use template tool

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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	6	×
Import	5		□ From other users
Title	Description		
Template for K	HW incidents template	Export 📄	Edit 🛃 Delete 🏢
		Export	Edit 🔛 Delete 🏦

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