Creating Templates

Note: You must have Administrator privileges.

Incident Template

- From the Overview Console click on >>Applications then select Administrator Console then Application Administration Console
- Click on the little blue bar next to the 'Standard Configuration' tab
- Double click on 'Incident Management'
- Double click on 'Template'
- Click on 'Template' again
- Click on 'Open' button. A list of all incident templates to which you are authorized will be displayed.
- Click on 'View' to edit an existing template.
- Click on 'Create' button to create a new template - fill in the required information:
  Template Name* - prefix with support group acronym e.g. FT staff
  Template Category Tier 1* - use pull-down menu to select correct category
  Template Status* - Enabled
  Classification tab – specify Incident Type (User Service Request or User Service Restoration)
  Required tabs: Classification, Categorization, Assignment, Authored For Groups
- Click on 'Save'

Task Template

- From the Overview Console click on >>Applications then select Administrator Console then Application Administration Console
- Click on the little blue bar next to the 'Standard Configuration' tab
- Double click on 'Task Management System'
- Double click on 'Task Configuration'
- Click on 'Task Template'
- Click on 'Open' button to create a new template or search an existing template.
- To create a new Task Template fill in the required information:
  Name* - prefix with support group acronym
  Summary* - description of task template
  Type* - Manual
  Status* - Active
  Category – Task Management System
  Visible – Yes
  Required tabs: General, Classification, Assignment
- Click on 'Save'

Task Group Template

- From the Overview Console click on >>Applications then select Administrator Console then Application Administration Console
- Click on the little blue bar next to the 'Standard Configuration' tab
- Double click on 'Task Management System'
- Double click on 'Task Configuration'
- Click on 'Task Group Template'
- Click on 'Open' button to create a new template or search an existing template.
- To create a new Task Group Template fill in the required information:
  Name* - prefix with support group acronym
  Summary* - description of template
  Company* - use pull-down menu to select York University
  Type* - Sequencing (tasks trigger in sequence) OR Standard (tasks can be completed concurrently)
  Status* - Active
  Category – Task Management System
  Visible – Yes
  Required tabs: Association (used to link task templates to the task group)
- Click on 'Save'

Relating an Incident to a Task or Task Group

- Double click on an Incident you want to work on
- Click on 'Links' then 'Tasks'
- Using the pull-down menu under 'Request Type' select either 'Task Template' or 'Task Group Template'
- Click on 'Relate' button
- Highlight the correct template
- Click on 'Relate' button
- Click on 'Close'

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