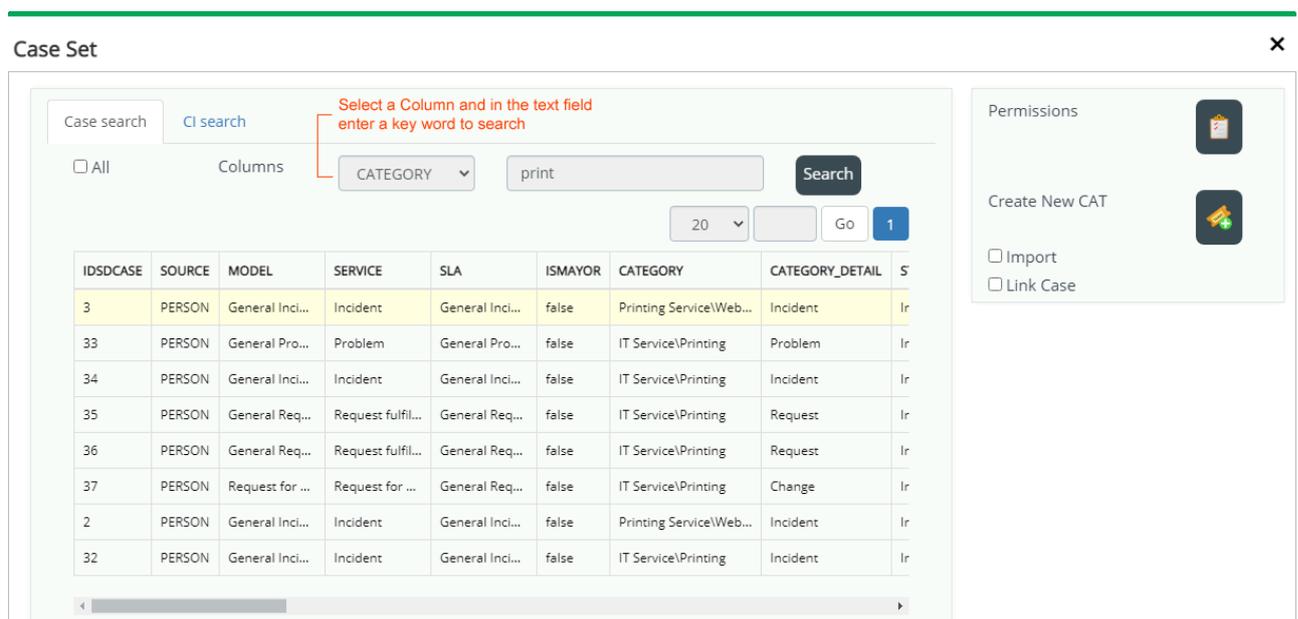


Quick ways to create a case

- 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:



3. Select a record and click on **Create New Cat** to open the case creation form. Additional options:
 - o **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.
 - o **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

×

Import and Link Case enabled:

Link Case ×

Select the case and fill in the following information

Select Case: Selected case 🔍

Category:

Relationship type: ▼

Title:

Description:

Accept ✔ Cancel ✖

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.

Link Case ✕

20 ▼ 1

Edit 

Id SD case relation	Relations type name	Id SD case	Relations title	Relations description	MT title model	Category	Category name	Case Status	Id cas rele typ
16	This case is ...	3	I can't print	Printing servi...	General Inci...	Printing Serv...	Incident	InProgress	1

Delete 

Add 

View 

Case relationship created

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.

Complete the following form

Case number: 43

Select user:

Select an User and complete/edit info to create case

Urgency: Is major:

Select Category

Printing Service\Web printing\Unknown\<<Incident>

Incident

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...

Impact: Priority:

Title:

Description:

Apply a Template

See How to use template tool

×

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 ✕

Import





From other users

Title

Template for K

General templ:

Description

HW incidents template

This templates applies for general inci

ExportEditDelete

ExportEditDelete

From:
<http://leverit.com/ithelpcenter/> - **IT Help Center**

Permanent link:
http://leverit.com/ithelpcenter/en:advisor:quick_case

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