

# iSupport<sup>®</sup> Training Course

## CREATING AND USING INCIDENT HEIRARCHY TEMPLATES

### **DESCRIPTION:**

A powerful help desk application can deliver an increase in time savings that will ultimately result in cost savings for your organization. Leveraging hierarchy templates in your incident management is a fundamental way to put the power of iSupport's automation in play and increase the efficiency of your service activities. This course will walk you through all stages of implementing hierarchy templates in incident-related activities. This course typically runs two to three hours depending on your requirements.

### **TOPICS COVERED:**

- Scenarios for Using Hierarchy Templates
- Creating Templates and Specifying Defaults
- Using Custom Fields, Categories, Routing, and SLAs  
with Hierarchy Templates
- Creating a Hierarchy
- Defining Closure Dependencies
- Creating and Closing Incidents using Hierarchy  
Templates in the Incident Screen
- Including Hierarchy Templates on the End User Desktop  
and Email Processing
- Q&A as Needed

COST: \$550 per seat  
LOCATION: Online  
SCHEDULE: 2-5 days in advance

## CREATING AND USING INCIDENT HEIRARCHY TEMPLATES

### AGENDA:

#### **Scenarios for Using Hierarchy Templates**

- Identifying multi-task functions in your environment
  - o Defining template workflows
  - o Defining workflow dependencies

#### **Creating a Category, Custom SLA and Support Representative Profiles**

- Before creating a template
  - o Ensure the appropriate categorization is available
  - o Custom SLAs (if applicable) are created
  - o Review Support Representative profiles and create a profile(s) if required

#### **Creating a Top Level Template**

- Basics
  - o Name
  - o Categorization
  - o Issue Description/Resolution
- Advanced
  - o Selecting the load balance method
  - o Selecting the default assignee, status, and priority
  - o Making available to customers and support representatives
  - o Associating with custom SLAs

#### **Creating a Lower Level Template**

- Determining the Dependency level
- Basics
  - o Name
  - o Categorization
  - o Issue Description/Resolution
- Advanced
  - o Selecting the load balance method
  - o Selecting the default assignee, status, and priority
  - o Associating with custom SLAs
  - o Determining the closure dependency
- Inserting Templates Into a Hierarchy
- Deleting Workflow Templates

#### **Including Hierarchy Templates on the End User Desktop**

- Including the template on the End User Desktop

#### **Creating and Closing Incidents in a Hierarchy in the Incident Screen**

- Selecting and viewing hierarchy templates
- Deleting incidents created from workflow templates

#### **Q & A as Needed**