How to Create/Use TEMPLATE Tickets with SRS

Log into my.calpoly.edu Portal and under the Single Click area, select Service Request

A. Creating the Standard Case

First, under the appropriate area: i.e. Service Request or Account Request, etc. Create a bogus standard ticket using the correct General/Specific Issues and all required fields (including the Solution field which is now a required field).

NOTE: You may want to include your Dept. acronym/Short Name at the start of the Summary and be clear/concise with your description of the Case (this will make it easier for you to identify and find the case in the Template View of Template tickets)

Click Finish and record the Case ID for future reference.
How to Create/Use TEMPLATE Tickets with SRS

B. Creating the Template Case available for use as a Template Ticket

EDIT the case you just entered:

In the Details Tab of the case: *Enter Time Spent data*

Under the CLOSING INFORMATION Tab within the case.

Template Ticket: Click the button *Yes*

Click *Finish* to save this case as a Template Ticket
C. Using Template Tickets to enter repetitive cases quickly

To access Template Tickets:
   Within the appropriate tab you created your Template Tickets, pull down the Saved Search options and select either Template Tickets or Template Tickets for Your Team

You will now see all the Template Tickets available for use on the system. You can sort the table by the Summary or any table header by clicking the column label to find your case.

NOTE: Please be aware that other Teams/Areas may have created Templates for their usage as well so please do not modify any Template Tickets you have not created for your area.
How to Create/Use TEMPLATE Tickets with SRS

Find the Template case you wish to use in the search window and click the Convert Button for that case.

Summary: Replace the ***NOTE: Add CALPOLYUSERNAME here***
**Time Spent: 10**

**Assigned Person:** Enter your Full Name & click the Look-up (spyglass) tool

**Username:** Enter the username of the Requestor (i.e. Telephone Coordinator)

**Status:** Closed – if you have completed the Directory Update Requested

When all required fields and appropriate fields are completed –
Click the CONVERT Button. The new case has now been created. Change the SET VIEW back to
**Summary View** to see the new case in the queue.