Configuring vs Cloning Use Cases

Use Case: "I like most things about a note template but wish it didn't have a certain tab/section."

Solution: Configure a Valant created template.

1. On the "Manage Mobile Notes Templates" page, in the template row, click **Configure** in the "Action" drop-down menu.
2. On the "Configure a Mobile Note Template page, in the Contents section, move desired Tabs/Sections from "Included Contents" into "Excluded Contents".
3. Click **Save.**

Use Case: "I want to change the name and contents and a few other things about a template."

Solution: Clone a Valant created template.

1. On the "Manage Mobile Notes Templates" page in the template row, click **Clone** in the "Action" drop-down.
2. On the "Clone a Mobile Note Template" page, make the desired changes to template name, contents section and any other changes.
3. Change the status of the template to "Draft" to come back to work on a template, or "Active" if ready for it to be used.
4. Click **Save**.
5. On the "Manage Mobile Notes Template" page, in the template row, click **Make Invisible in Mobile Notes** for the original Valant created template so that this template will no longer appear in Mobile Notes, since users will be documenting with the newly-created template instead.

Use Case: "I want two versions of the same template, slightly different, for two different sets of users. (Mental Health, Substance Use) at my practice."

Solution: Clone a Valant created template, adjust, and clone your recent clone.

1. On the "Manage Mobile Notes Template" page, in the template row, click **Clone** in the "Action" drop-down.
2. On the "Clone a Mobile Note Template" page, make the desired changes to template name, contents section and any other changes.
3. Click **Save**.
4. On the "Manage Mobile Notes Template" page in the template that was cloned in steps 1-3 click **Clone** in the "Action" drop-down.

5. On the "Clone a Mobile Note Template" page, make the desired changes to the most recently cloned template.
6. Click **Save.**
7. On the "Manage Mobile Notes Templates" page, in the template row, select **Make Invisible in Mobile Notes** on the original Valant created template so that this template will no longer appear in Mobile Notes, since users will be documenting with the new templates clone instead.