

SI and SO – Clearing the confusion.

An “SI” or Service Identifier is simply a task

An “SO” or Service Occurrence is any service performed for a task (or SI)

You must have an SI before any SO can be created.

SI’s and SO’s have a many-to-many relationship. Meaning it may take many SO’s to service one SI, and one SO can service many SI’s.

Confused?

Let say you created three SI’s (tasks) for your client:

1. Install a keyboard
2. Clear up storage space
3. Setup 5 new workstations

Scenario 1:

A technician is sent on day one to handle task 2. He creates an SO for that task (SI) and completes it

Task 2 was handled by one SO.

Scenario 2:

Same as above. The technician has extra time and installs the keyboard as well on the same visit.

Both Task 1 and 2 were handled by one SO.

Scenario 3:

A technician goes to the client to install the new workstations. It takes him 3 visits on three separate days to install all 5 machines – each time he came he created a new SO.

Task 3 was handled by three separate SO’s.