

## **SI and SO lifecycles**

*Service Identifiers (SI's) have a total of three life cycles:*

Note: Once an SI is created it cannot be deleted.

### **In Progress:**

This is the status of a new SI

### **Completion Requested:**

Once an SO is submitted for approval with the corresponding task (or SI) as 'closed'.

An SI status can also be changed to Completion Requested with out any SO's assigned to it. This need often occurs when a task has been resolved without any need for service. Edit the SI and click on the "Cancellation Requested" button. A prompt with require a reason for cancellation; the SI is now in the Completion Requested stage where it can be approved and closed.

If SO's have been created but not submitted with the task as closed, use the "Change SI Status to Completion Requested" button on the SI page to advance the SI lifecycle. Type in a reason for cancellation in the adjacent text box.

An SI status cannot be changed to Completion Requested as long as any corresponding SO's are still "In progress" (See below for SO lifecycles)

### **Closed (Completed):**

Once an SI is approved. SO's may not be created from this SI any longer.

Once an SI is closed it may not be edited. However a Master Admin user may still modify the assigned technicians to a closed SI. This functionality is available to allow different technicians who were originally not assigned to a particular SI to view any service history and details of this SI.

Service Occurrences (SO's) have a total of four life cycles:

In Progress:

This is the status of a new SO

Pending Approval:

An SO status changes to this stage once an SO is submitted for approval

Approved:

An SO status changes to this stage once an SO is approved.

Additionally, any tasks (SI's) that were changed to 'Closed' in the SO when the SO was submitted for approval can be easily closed as well. This feature is possible by clicking on the "Approve & Close SIs" link from the SO itself. If you simply "Approve" the SO, the corresponding SI statuses will remain unchanged even for those tasks that we changed to closed in the submitted SO.

Archived:

Once an SO has been billed or invoiced its status should be changed to archived.