Managing Service Plans

Details

Approving/Rejecting/Marking as Open
  Mark as Approved
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Learn About

To manage Service Plans, click Start->Service->Manage Service Plans:
You can also create and manage Service Plans via a tab at the bottom of the Project Explorer:

Approving/Rejecting/Marking as Open

From the Home tab of the Service Plan Explorer you can mark Service Plans as Approved, Rejected, or Open. You must have permissions for these three functions.
Mark as Approved

When you mark a Service Plan as Approved, the Service Plan will be locked for edit and the Status will automatically be set to Approved. If any required fields for approval are missing (Plan Length, Start/End Date), you will be prompted to edit the Service Plan to edit these fields.

If all the required fields are populated, you will get the following summary and will need to click the Mark as Approved button:
**Mark as Rejected**

When you mark a Service Plan as Rejected, the Service Plan will be locked for edit and the Status will automatically be set to Rejected. The Service Plan will be locked for edits.

![Mark Service Plan as Rejected](image)

**Mark as Open**

If you need to change or mind on an Approved or Rejected Service Plan, or if you need to make edits, you will need to mark the Service Plan as Open.

**Locking Service Plans**

From the Tools tab you can Lock/Unlock a Service Plan from edits, or lock Service Plan reports from being run. You must have permission to Lock/Unlock Service Plans and/or Reports.

![Tools tab](image)

These functions can be set manually, or through Workflow Rules.
Creating Templates

This can only be done via the Service Plan Explorer. To create a Service Plan Template, you first create a Service Plan, click [here](https://support.d-tools.com/0000_SI_Documentation_(v13)/User_Guide/06_Service_Plans/4_Managing_Service_Plans) for full details. For a Template you will still need to select a Client while creating the Service Plan, but you can choose any Client from your list as this field will not carry over to the Template. Once the Service Plan is created, select it in your list and click the Template button:

A dialog will open populated with the Name and Description of the Service Plan you selected but you can edit the fields as needed:

When creating a new Service Plan you can choose to use one of our saved Templates:
Service Orders for Service Plans

Once you have Approved a Service Plan, you can then associate Service Orders with the Service Plan. The actual hours entered in the Service Plan for the Resource(s) can then be compared with the Allowable Hours set on the Service Plan.

Service Orders can be created/managed via the tab that will be added to Service Plan itself, or you can create and manage them in the Service Orders section at the bottom of the Service Plan Explorer:
Of course you can still create/manage Service Orders via the Service Order Explorer.

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