# **Canceling Work Orders**

1.	PURPOSE	1
2.	Procedure	2
3.	RELATED DESK INSTRUCTIONS	7
4.	ROLE AUTHORIZATION	7
5.	DOCUMENT CONTROL	7

# 1. Purpose

- 1.1 Work orders are often canceled, but only under specific circumstances. Usually due to
  - Lack of manpower
  - Superseded by extra work orders that are open in the system due to an error.
  - Or work order left open so long that another work order has opened up... which is still lack of manpower
  - Building or equipment owner requested it been canceled or not performed.
  - Equipment found to be undergoing repairs, renovations, idled (off-line) or retired/abandoned in place.

It is important that we document why a work order has been canceled for root cause analysis. This allows us to put labor estimates needed for establishing service level requirements.

Work orders can ONLY be canceled *IF*:

- No labor (primary or secondary labor) has been charged
- No purchase orders or material have been charged
- 1.2 What you need to know:
  - Only the PRIMARY crew can *CANCEL* the work order. DO NOT cancel the work order if your crew is a secondary crew.
  - If you are a secondary crew, cancel your secondary labor and leave the work order

#### 2. Procedure

- 2.1 Query work order
  - 2.1.1 Query the work order. There are various ways to do this.

Parent WO 30	000003 ZO	NE 3 TROU	BLE CALLS					
Main Attrib	outes Tasks	Crews	Parts	Tools	PO's	Routing	Readings	Closing
Asset								Print
Equipment						<u> </u>		Library
General Inform	nation	, Cu	rrent Status	J Dates		Tracking 1		Request
Туре	TROUBLE		Status	OPEN				
Priority	4	Mate	rial Status					Related WO
Method	IN HOUSE		Start Date	MON JUN 2	2, 2015	Tracking 2		Create WO
Assigned To	02001		Due Date	FRI JUL 10,	2015			Billing
Outage Class			Completed			Non-Availal	ble	Dining
Primary Labo								Estimates
Crew	093		Site	UTM		Travel Tim	e	Dates
Craft	CARPENTER		Building	0737				Audit
Crew Size			Floor	01				Conv to Proi
Est Hrs/	25		Room	[		_	-	
Current Est Hrs			Zone	3		Print Ti	cket On N	ext Batch Run

# 2.2 Review the crews listed

- 2.2.1 If your crew is not listed, refer to the FMM Secondary Labor Close/Cancel SOP.
- 2.2.2 If your crew is listed, then proceed to next step.

NO Number 37 Parent WO 30	396301 JI 000003 Z0	HH: EA	ST & W	VEST EXTE BLE CALLS	RIOR DOORS	LEAKING	(PLS SEE N	OTES)	
Main Attributes Tasks Crews Parts Tools PO's Routing Reading									
Asset Asset Class								<b>F</b> F)	Print
Equipment									Library
General Inform	nation		Cur	rent Status	s / Dates		Tracking 1		Request
Туре	TROUBLE			Status	OPEN				Pelated WO
Priority	4		Mater	ial Status			Tracking 2		
Method	IN HOUSE		5	Start Date	MON JUN 22	. 2015	Trading 2	(	Create WO
Assigned To	02001			Due Date	FRI JUL 10,	2015	Nen Ausileh		Billing
Outage Class			C	ompleted			Non-Availab		Estimates
Primary Labor	r		31	Location	1				D .
Crew	093			Site	UTM		Travel Time		Dates
Craft	CARPENTER			Building	0737				Audit
Crew Size				Floor	01			C	onv to Proj
Est Hrs/ Current Est Hrs	.25			Room Zone	3		Print Tic	cket On Ne	xt Batch Run

2.3 Verify no charges for material or labor

# 2.3.1 Right mouse click on the work number.

ork Order 🛛 🖓					·····				: <u> </u>
WO Number 373 Parent WO 300	Gut Gopy	EAST & W	VEST EXTE	RIOR DOOR	IS LEAKING	(PLS SEE N	NOTES)		] ]
Main Attribut	Paste	Crews	Parts	Tools	PO's	Routing	Readings	Closing	
Asset	View/Edit							Print	
Equipment	Cost Summary							Library	
General Informa	Print	Cur	rent Status	/ Dates		Tracking 1		Request	
Туре	ROUBLE		Status	OPEN				elated WO	
Priority 4	l	Mater	ial Status						

#### 2.3.2 Select Cost summary

🛃 FAMIS 8i (mack_	darnell_j@tra	indb)						
Eile Edit Query	Record Atta	ichments <u>W</u> ind	dow <u>H</u> elp					
🛛 🖨 I 👗 🛛	h 🛍 i 🖌	R & R &	)  🕼 🛛 😭	🚰 i 🔶 🔶	🕈 🏟 [ %			
🖌 Work Order Cos	t Summary							⊙≚×
WO Number Parent WO	37396301 30000003	JHH: EA	AST & WEST EXT TROUBLE CALL	TERIOR DOORS	LEAKING (PL	S SEE NOTE	S)	
Summary	Labor	Material	Invoices	Equip Rental	Misc Costs	Billed		
	E	stimate	Actual	Committed	Balan	ce		
Labo	r 🗌	8.26				8.26	Request	
Materia	1	.00	.00	.(	0	.00	Print	
Invoices	5	.00	.00	.(	0	.00	Datas	
Equipmen	t	.00	.00			.00	Dates	
Contingency	Y	.00	.00			.00		
Tota	i	8.26	.00	.(	0	8.26		

- 2.3.3 Click on each tab to make sure they are clear
  - No labor should be posted,
  - No materials or PO should up.
  - All should be blank.

#### **Desk Instruction**



Summary	Labor	Material Invoic	es Equip Ren	tal Misc	Costs	Billed		Summary	Labor	Material	Invoices Equip Rental	Misc Costs	Billed	
Employee	Work Date	Class	Pay Code	Factor	Rate	Hours	Amount	Part No.	Description	Issued	Issued To	U/M	Quantity	Amount
									_			_		
	_		_					-	_			-		
			_						_			-	_	
1								1			i i			
	_								_			_		
Community [	1		1	1 1				-	-	-				
Comments							_		_	1				
1					-			1	_			Total Mark		00
			Total Labor Hour	s / Amount	E	.00	.00	view				Total Math	enai Amount	.00
										1				
Summary	Labor	Material Invoid	es Equip Ren	tal Misc	Costs	Billed		Summary	Labor	Material	Invoices Equip Rental	Misc Costs	Billed	
Summary PO Number	Labor Release No. Li	Material Invoic	es Equip Ren Description	tal Misc	Costs	Billed	Amount	Summary Cost No.	Labor Cost Type	Material	Invoices Equip Rental	Misc Costs Rate	Billed	Amount
Summary PO Number	Labor Release No. Li	Material Invoic ine No. Vendor	es Equip Ren Description	tal Misc	Costs	Billed	Amount	Summary Cost No.	Labor Cost Type	Material	Invoices Equip Rental	Misc Costs Rate	Billed	Amount
Summary PO Number	Labor Release No. Li	Material Invoic	es Equip Ren Description	tal Misc	Costs	Billed	Amount	Summary Cost No.	Labor Cost Type	Material Description	Invoices Equip Rental	Misc Costs Rate	Billed Quantity	Amount
Summary PO Number	Labor Release No. Li	Material Invoic	es Equip Ren Description	tal Misc	Costs	Billed	Amount .00 =	Summary Cost No.	Labor Cost Type	Material Description	Invoices Equip Rental	Misc Costs Rate	Billed Quantity	Amount
Summary PO Number	Labor Release No. Li	Material Invoic	es Equip Ren Description	tal Misc	Costs	Billed	Amount	Summary Cost No.	Labor Cost Type	Material Description	Invoices Equip Rental	Misc Costs Rate	Billed Quantity	Amount
Summary PO Number	Labor Release No. Li	Material Invoice	es Equip Ren Description	tal Misc Total	Costs	Billed	Amount .00 * 	Summary Cost No.	Labor Cost Type	Material Description	Invoices Equip Rental	Misc Costs Rate	Billed Quantity	Amount
Summary PO Number	Labor Release No. Li	Material Invoic	es Equip Ren Description	tal Misc	Costs	Biled	Amount .00 * .00	Summary Cost No.	Labor Cost Type	Material Description	Invoices Equip Rental	Misc Costs Rate	Billed Quantity	Amount
Summary PO Number View Credit Voc	Labor Release No. Li	Material Invoic ine No. Vendor	es Equip Ren Description	tal Misc Total	Costs	Biled	Amount .00 • .00 Amount	Summary Cost No.	Labor Cost Type	Material Description	Invoices Equip Rental	Misc Costs Rate	Billed Quantity	Amount
Summary PO Number View Credit Voch	Labor Release No. Li Suchers er No PO Numb	Material Invoic	es Equip Ren Description	tal Misc Total	Costs	Biled	Amount .00 .00 Amount	Summary Cost No.	Labor Cost Type	Material Description	Invoices Equip Rental	Misc Costs Rate	Billed Quantity	Amount
Summary PO Number	Labor Release No. Li Suchers er No PO Numb	Material Invoic	es Equip Ren Description	tal Misc Total Restocking	Costs	Biled	Amount .00 .00 Amount 	Summary Cost No.	Labor Cost Type	Material Description	Invoices Equip Rental	Misc Costs Rate	Billed Quantity	Amount
Summary PO Number View Credit Vouch	Labor Release No. Li	Material Invoic	es Equip Ren Description	tal Misc Total Restocking Tota	Costs	Biled	Amount .00 .00 Amount 	Summary Cost No.	Labor Cost Type	Material Description	Invoices Equip Rental	Misc Costs Rate	Billed Quantity	Amount

2.3.3.1 If any tabs are not blank, then it can only be closed.

2.3.4 Close the cost summary by clicking the "X", in the right hand corner of the dialogue box.



#### 2.4 Cancel work order

2.4.1 From the work order closing screen,



─ Work Data ─ Status Type	OPEN Do Statuses 00000000000000000000000000000000000	pment Data			
Start Date Due Date	Find %	Jp rs			-
Arrived Completed	Status ASSIGNED BLKT OPDER	ge			D
<ul> <li>Employee Da</li> </ul>	CANCELED	ormance Codes -			
Assigner Authorized Inspected	CLOSED CONTRACT HOLD MSTR_SCHED OPEN	Condition Cause Action			
	PEND MATLS	. 21, 2013	14172	3333	
	Eind QK Cancel	27, 2015	14408	3355	RTE000002 RTE000003
,	Assign W Close WO	Close Error E	xport Expre	ess Labor	Reports

- 2.4.2 System auto populates the start, due and completed dates.
- 2.4.3 Go to the bottom right part of the screen, "Performance Codes," select the LOV button, appropriate reason code for canceling the work order.

LOV button or "snake eyes"

The *only options* for canceling work orders are the following:

	RENOVATIONS
EQUIP RETR	CANCELED - EQUIPMENT RETIRED, REMOVED, IDLED, REPAIRS or
OWNR REQT	CANCELED - AT OWNER REQUEST
ERROR	CANCELED - ERROR, DUPLICATE OR SUPERCEDED BY OTHER WO'S
LACK MNPWR	CANCELED - LACK OF MANPOWER

Click "ok" when done.



						<u></u>
WO Number	37396301	JHH: EAST & W	EST EXTERIOR D	OORS LEAKIN	G (PLS SEE N	IOTES)
/ork Order At	tributes T	ask List Crews	Labor	Material	Readings	
Asset		T				
Asset Class						Close Dates
Equipment						Audit
Work Data			Equipment	t Data		
Status	CANCELED		- Down Ti	me		
Туре	TROUBLE		Down			
Start Date	MON JUN 22	2, 2015	Up			
Due Date	FRI JUL 10,	2015	Hours			
Arrived						
Completed	TUE JUN 23,	, 2015 2:19PM	Usage			
<b>- - - -</b>						
Employee Da	ita		Performan	ce Codes		
Assigne	d To 02001		Conc	lition		
Authorize	d By		C	ause		
Inspecte	d By		A	ction Cause	es innonnna ar	
	N 22, 2015	Crew	093 .	Find	%	
		Craft	CARPENTER	Ca	100	Description
Assign W	Close WO.	Crew Size		EQ	UIP RETR	CANCELED - EQUIPI
		Est Hrs/	.25	ERI	ROR	CANCELED - ERROR
		Current Est Hrs		FIR	E	HEAT, SMOKE, WAT
				FLO	COD	FLOOD WATER
				NE	GLECT	LACK OF MAINTENA
				OW	/NR REQT	CANCELED - AT OW
					ER ERR	

2.5 Click submit to save work. Proceed to the next work order.



# 3. Related desk instructions

All work instructions are located at <u>FAMIS Desk Instructions</u>. (See <u>https://wikis.utexas.edu/display/WORQS/FAMIS+Desk+Instructions</u>)

- 3.1 Canceling Work Orders
- 3.2 Closing/Canceling Work Orders for Sec Labor Crews Associate PM and EQ Record
- 3.3 Closing Work Orders
- 3.4 Work Order Closing Form

# 4. Role Authorization

Running the Equipment PM Schedule requires the role of "UT Crew Supervisor" at a minimum. Contact worqs@austin.utexas.edu or at 512-232-5020 for more information on this role.

# 5. Document Control

Filename	Title	Revision Date	Document Owner	Summary of Changes	Status
FMM_WOClose _Cancel.pdf	Canceling Work Orders	11/17/2012	Patti Soskins	Original.	Retired
CancelingWork Orders_06-23- 2015.pdf	Canceling Work Orders	06/23/2015	FOM Engineering, Tech, Support	Added Canceled reason codes and Review of Cost Summary tabs.	Released
Canceling work Orders_08-18- 2015.docx	Canceling Work Orders	08-18-2015	FOM Engineering, Tech, Support	Add additional information to the definition of Canceled for equipment, "EQUIP RETR," section 2.4.3.	Released