

## Canceling Work Orders

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### 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- Superseded by extra work orders that are open in the system due to an error.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.

The screenshot shows the 'Work Order' window with the following details:

- WO Number: 37396301
- Parent WO: 30000003
- Asset Class: [Empty]
- Equipment: [Empty]
- General Information: Type: TROUBLE, Priority: 4, Method: IN HOUSE, Assigned To: 02001, Outage Class: [Empty]
- Current Status / Dates: Status: OPEN, Start Date: MON JUN 22, 2015, Due Date: FRI JUL 10, 2015, Completed: [Empty]
- Primary Labor: Crew: 093, Craft: CARPENTER, Crew Size: [Empty], Est Hrs: [Empty], Current Est Hrs: .25
- Location: Site: UTM, Building: 0737, Floor: 01, Room: [Empty], Zone: 3

### 2.2 Review the crews listed

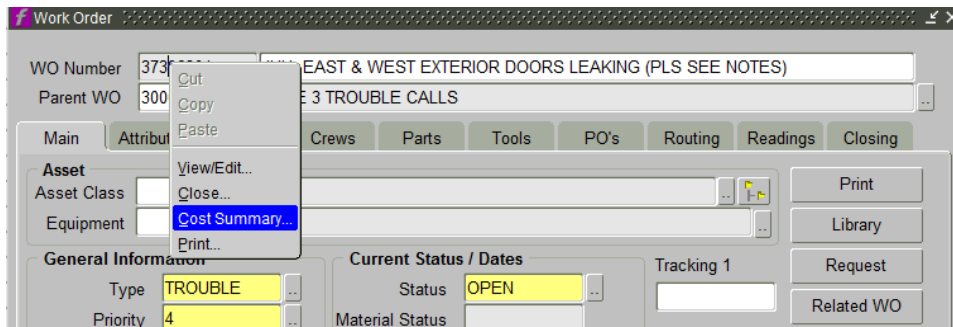
2.2.1 If your crew is not listed, refer to the FMM Secondary Labor Close/Cancel SOP.

2.2.2 If your crew is listed, then proceed to next step.

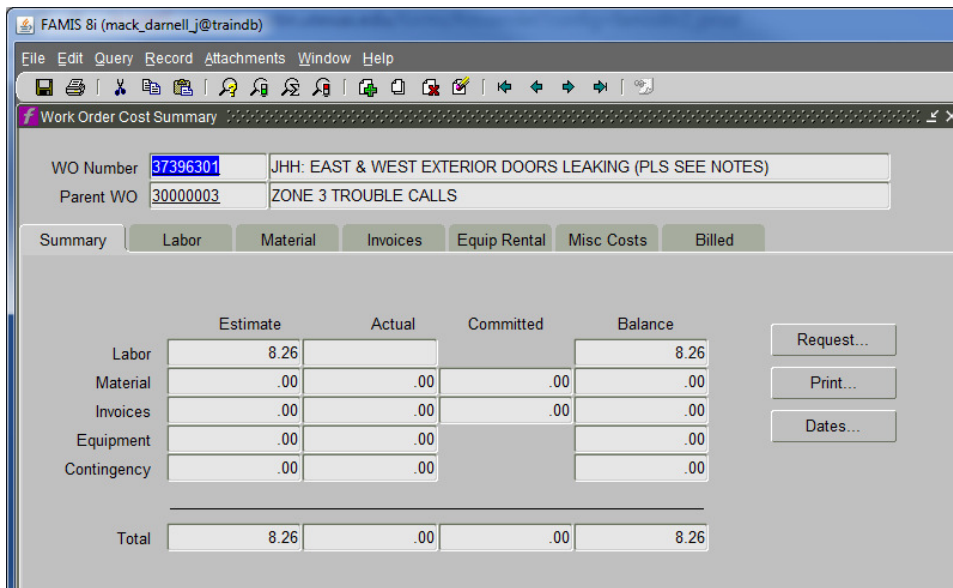
This screenshot is identical to the one above, but with a red rectangular box highlighting the 'Primary Labor' section. The details in this section are: Crew: 093, Craft: CARPENTER, Crew Size: [Empty], Est Hrs: [Empty], and Current Est Hrs: .25.

2.3 Verify no charges for material or labor

2.3.1 Right mouse click on the work number.

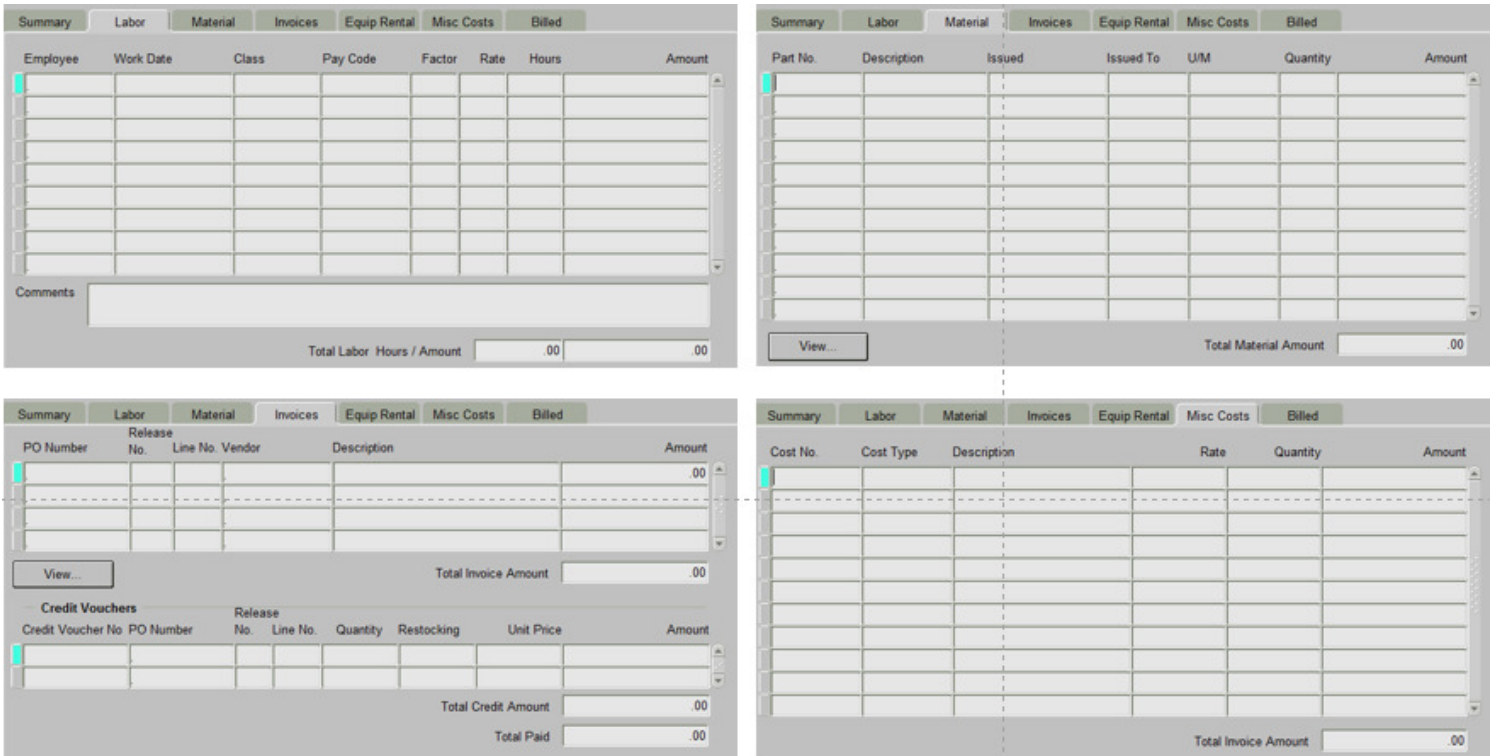


2.3.2 Select Cost summary



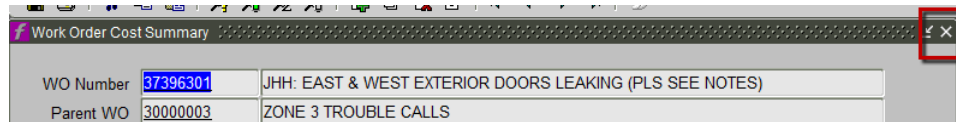
2.3.3 Click on each tab to make sure they are clear

- No labor should be posted,
- No materials or PO should up.
- All should be blank.



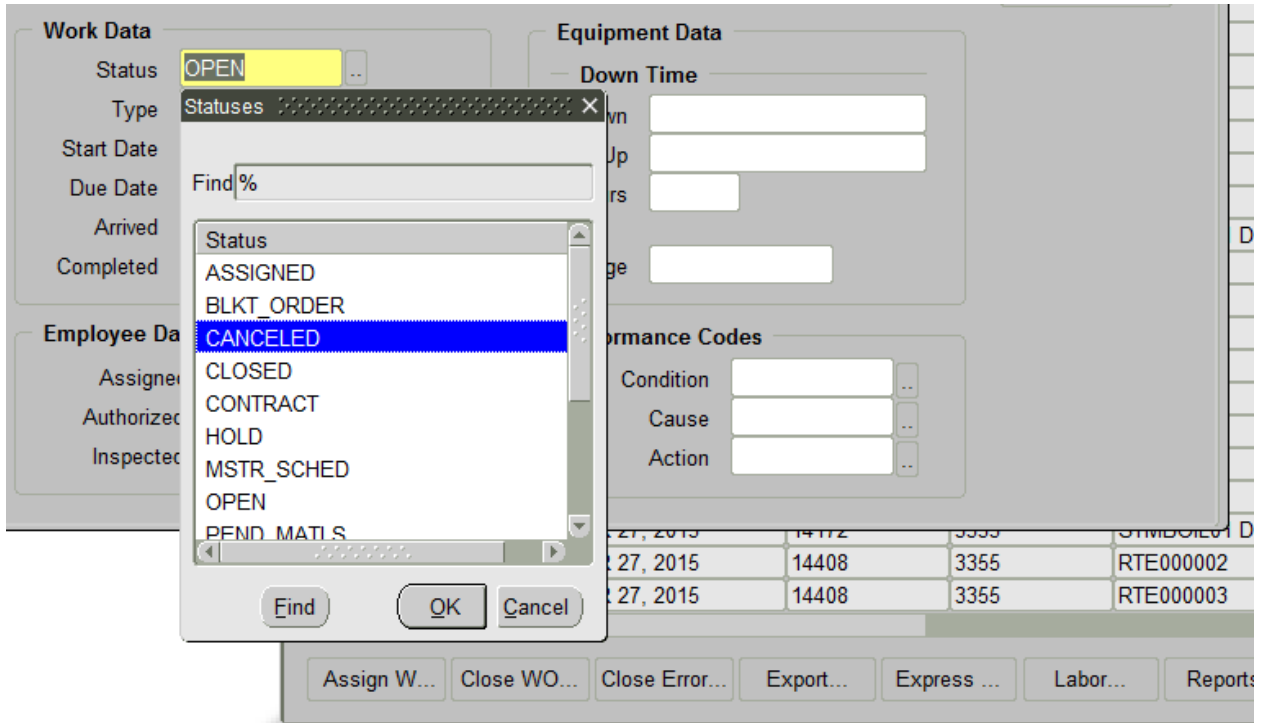
2.3.3.1 If any tabs are not blank, then it can only be closed.

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,



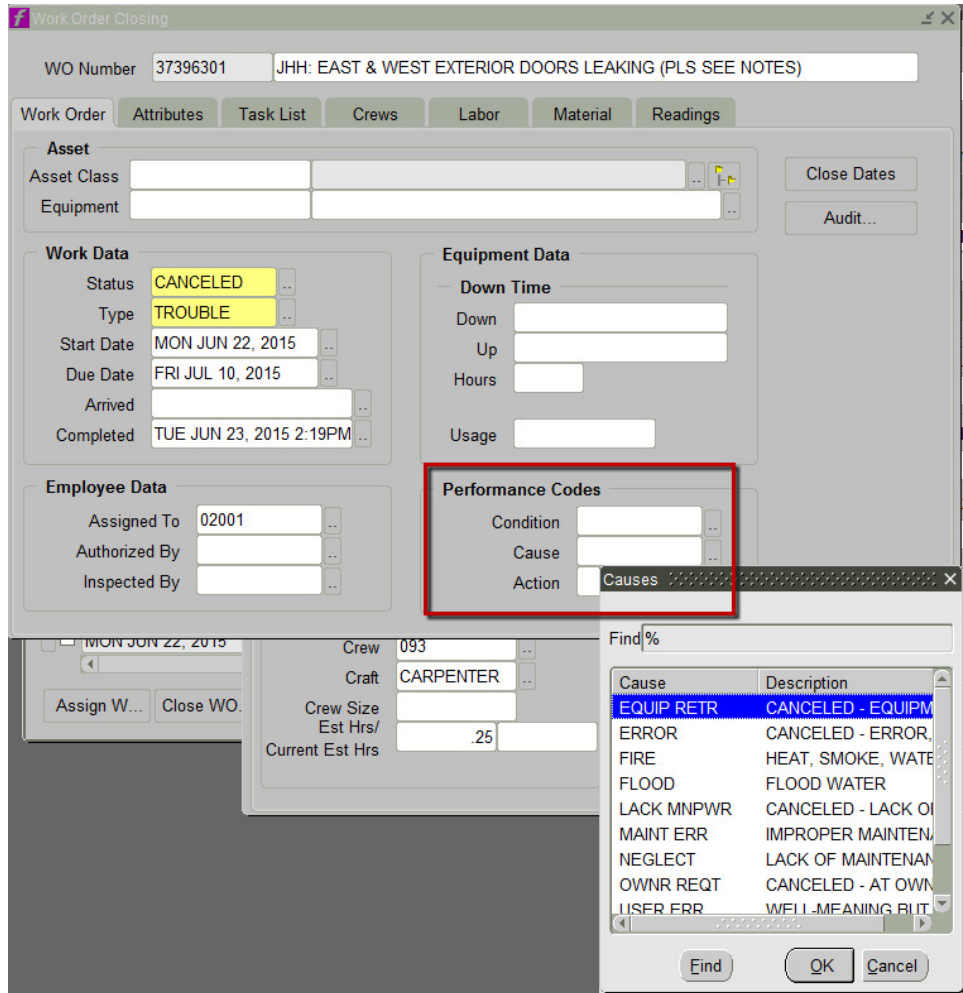
- 2.4.2 System auto populates the start, due and completed dates.
- 2.4.3 Go to the bottom right part of the screen, "Performance Codes," select the LOV button, appropriate reason code for canceling the work order.



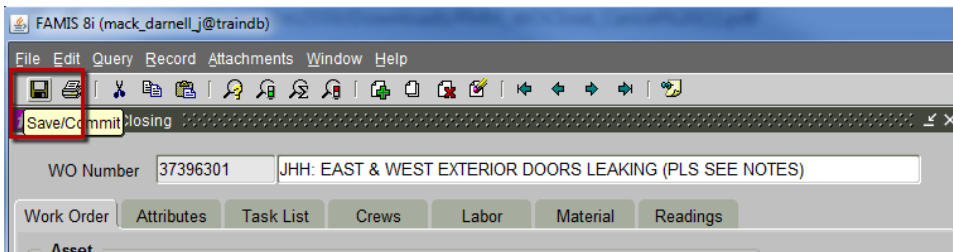
The ***only options*** for canceling work orders are the following:

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

Click "ok" when done.



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



### 3. Related desk instructions

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

- 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](mailto: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
CancelingWorkOrders_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 workOrders_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