

Canceling Work Orders and Routes

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- Superseded by extra work orders that are open in the system due to an error.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

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' software interface. At the top, the 'WO Number' is 37396301 and the description is 'JHH: EAST & WEST EXTERIOR DOORS LEAKING (PLS SEE NOTES)'. The 'Parent WO' is 30000003 and the description is 'ZONE 3 TROUBLE CALLS'. Below this are tabs for 'Main', 'Attributes', 'Tasks', 'Crews', 'Parts', 'Tools', 'PO's', 'Routing', 'Readings', and 'Closing'. The 'Main' tab is active, showing 'Asset' information (Asset Class and Equipment), 'General Information' (Type: TROUBLE, Priority: 4, Method: IN HOUSE, Assigned To: 02001, Outage Class), 'Current Status / Dates' (Status: OPEN, Material Status, Start Date: MON JUN 22, 2015, Due Date: FRI JUL 10, 2015, Completed), 'Primary Labor' (Crew: 093, Craft: CARPENTER, Crew Size, Est Hrs, Current Est Hrs: .25), and 'Location' (Site: UTM, Building: 0737, Floor: 01, Room, Zone: 3). On the right side, there are tracking fields (Tracking 1, Tracking 2, Non-Available, Travel Time) and a list of buttons: Print, Library, Request, Related WO, Create WO, Billing, Estimates, Dates, Audit..., and Conv to Proj... There is also a checkbox for 'Print Ticket On Next Batch Run'.

2.2 Review the crews listed

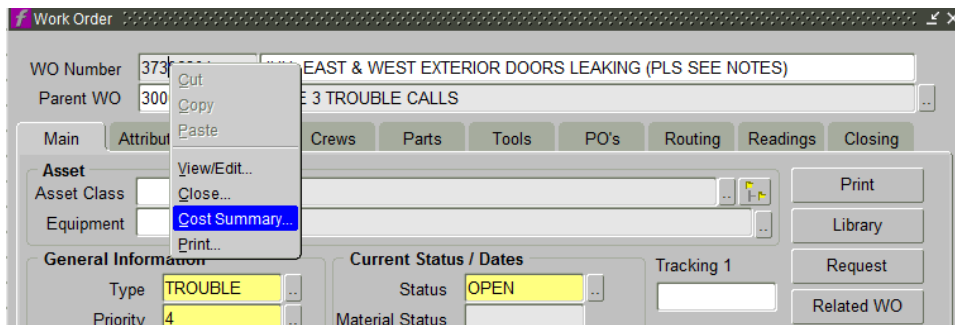
2.2.1 If your crew is not listed, refer to the FMM Secondary Labor Close/Cancel SOP.

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

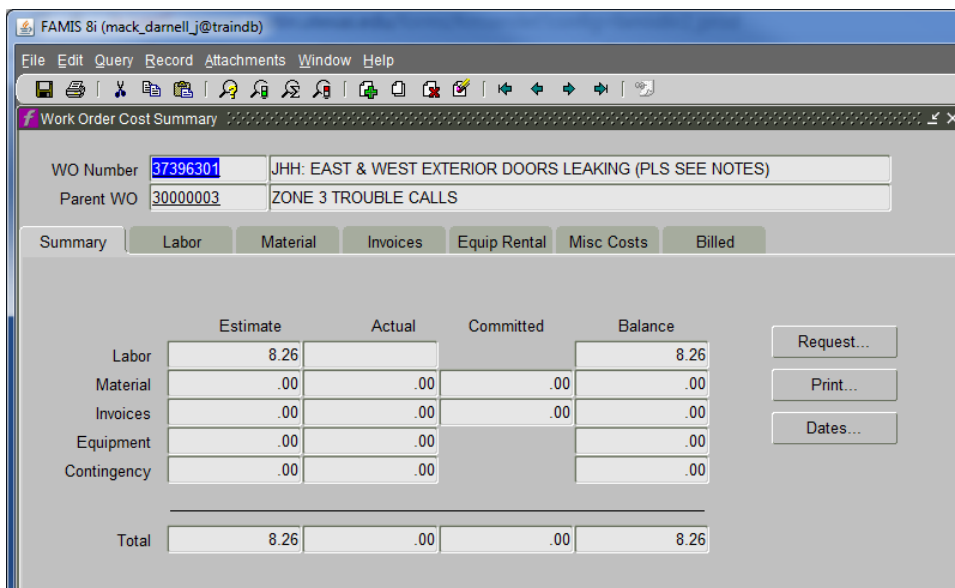
This screenshot is identical to the one above, showing the 'Work Order' software interface. The 'Primary Labor' section, which includes fields for Crew (093), Craft (CARPENTER), Crew Size, Est Hrs, and Current Est Hrs (.25), is highlighted with a red rectangular box.

2.3 Verify no charges for material or labor

2.3.1 Right mouse click on the work number.

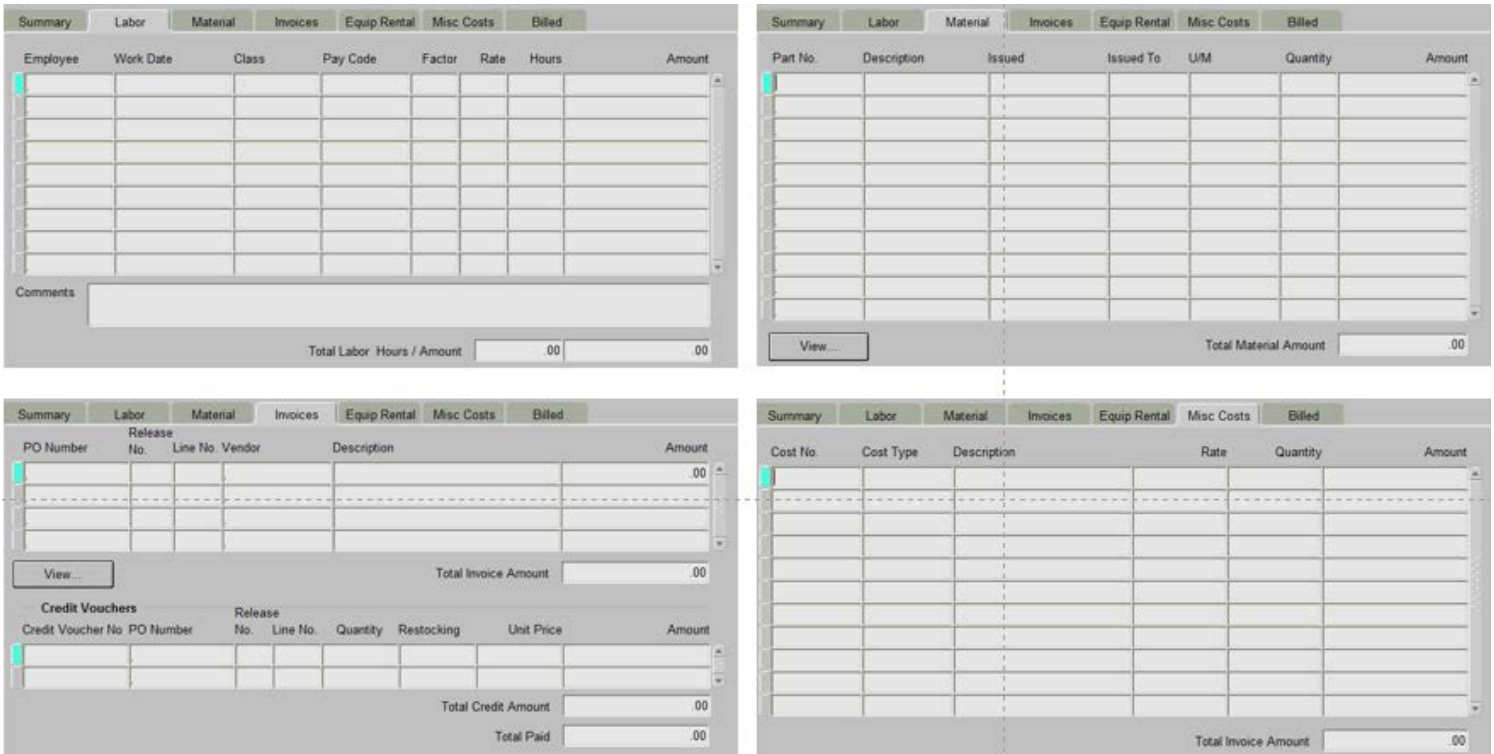


2.3.2 Select Cost summary



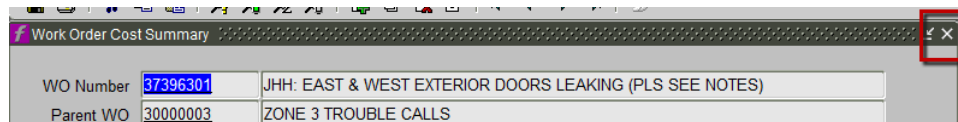
2.3.3 Click on each tab to make sure they are clear

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



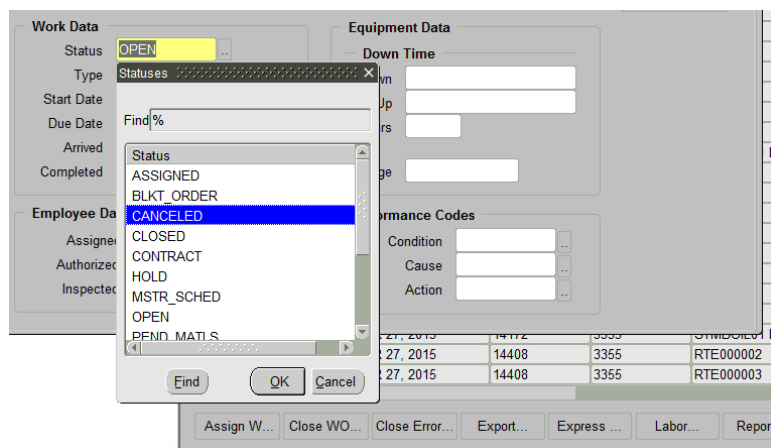
2.3.3.1 If any tabs are not blank, then it can only be closed.

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, select “canceled.”

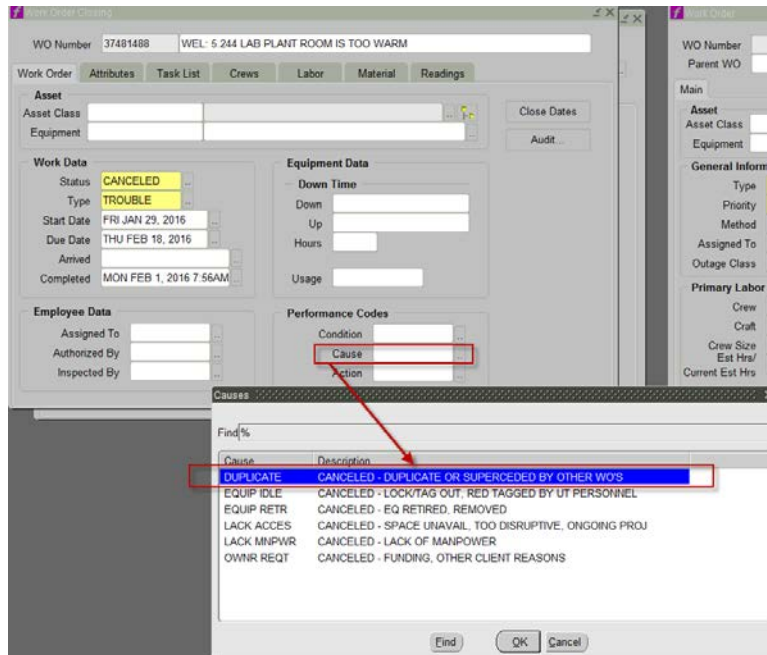


- 2.4.2 System auto populates the start, due and completed dates.
- 2.4.3 Go to the bottom right part of the screen, "Performance Codes," select the LOV button, appropriate reason code for canceling the work order.

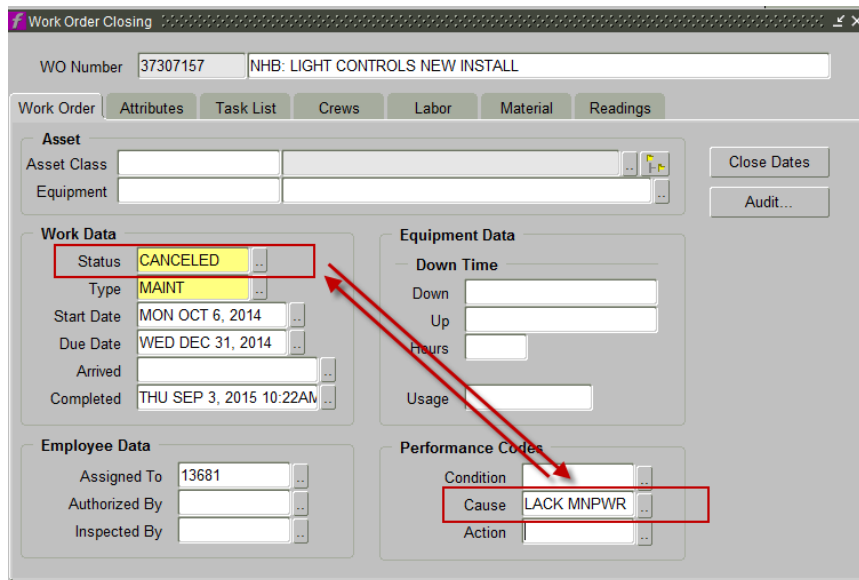


The ***only options*** for canceling work orders are the following:

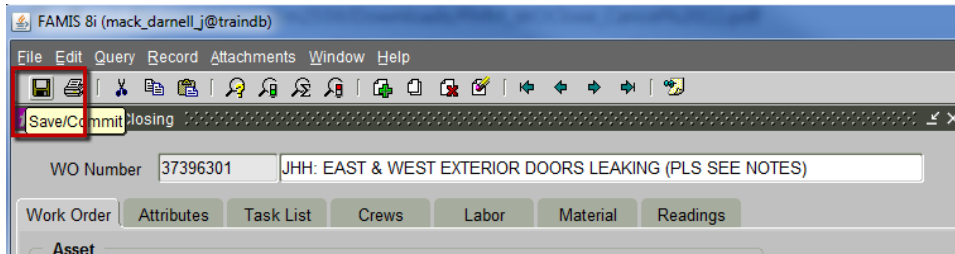
Cause	Description	Examples
DUPLICATE	CANCELED - DUPLICATE OR SUPERCEDED BY OTHER WO'S	
LACK MNPWR	CANCELED - LACK OF MANPOWER	
LACK ACCES	CANCELED - SPACE UNAVAILABLE, TOO DISRUPTIVE TO CLIENT, ONGOING PROJECT	
OWNR REQ	CANCELED – FUNDING, OTHER CLIENT REASONS	
EQUIP RETR	CANCELED - EQUIPMENT RETIRED, REMOVED	
EQUIP IDLE	CANCELED –LOCK/TAG OUT, RED TAGGED BY UT PERSONNEL	



2.4.4 Click “ok” when done. Confirm that the Canceled and Cause are populated.



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



3. Procedure for Route Work Orders

3.1 Query the Route work order

3.1.1 Query the Route work order. There are various ways to do this.

3.1.2 Canceling routes is the same as “closing” a route.

3.1.2.1 Cancel the *child work orders* **WITH** a cause.

3.1.2.2 Cancel the *parent work order* **WITH** a cause.

3.2 Complete steps 2.2 thru 2.4 above for the Route to ensure there are no material or labor costs.

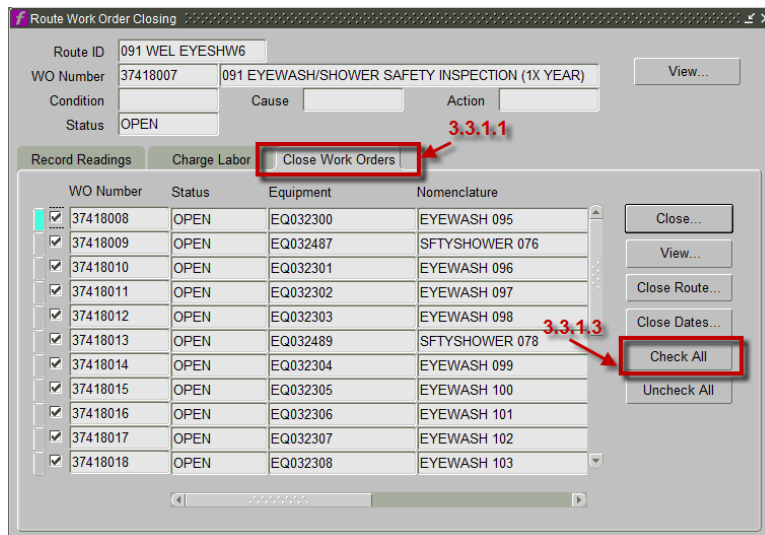
3.3 Go to Route Work Order Closing screen

3.3.1 Close the Child work orders.

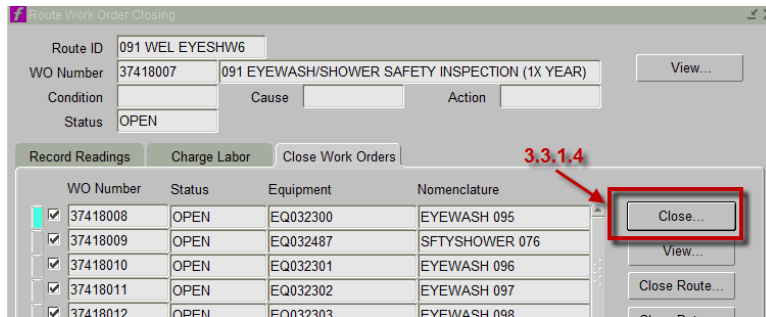
3.3.1.1 Right mouse click on the work order number, or go to Close Route WOs

3.3.1.2 Click on the “Close Work Orders” tab.

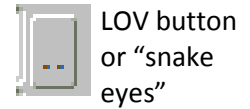
3.3.1.3 Click “Check All”



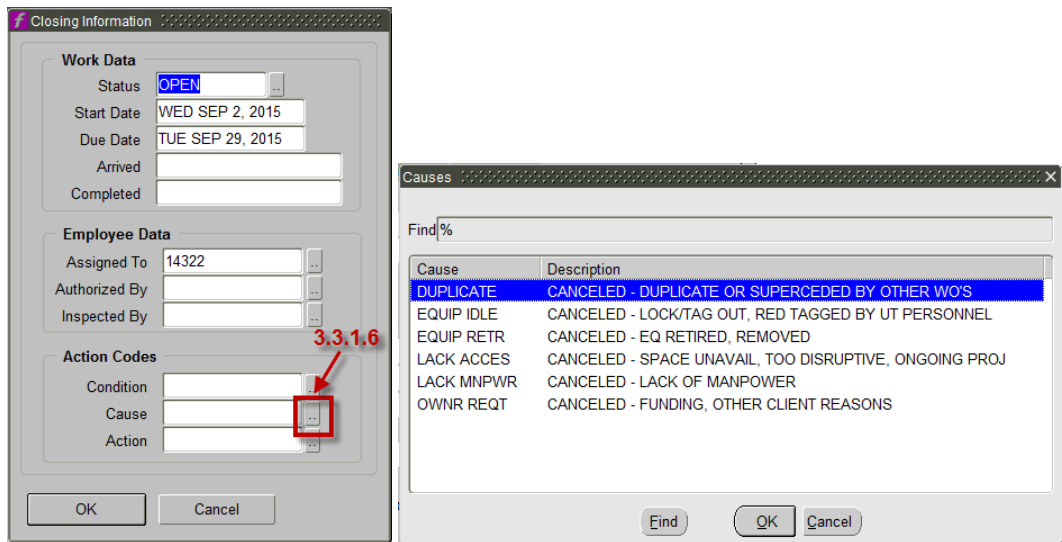
3.3.1.4 Click on the “Close” Button to close the child work orders.



3.3.1.5 The Closing Information dialogue form comes up like the following. Click on the LOV Button. Also called the “snake eyes.” Select the appropriate codes



3.3.1.6 Click ok.

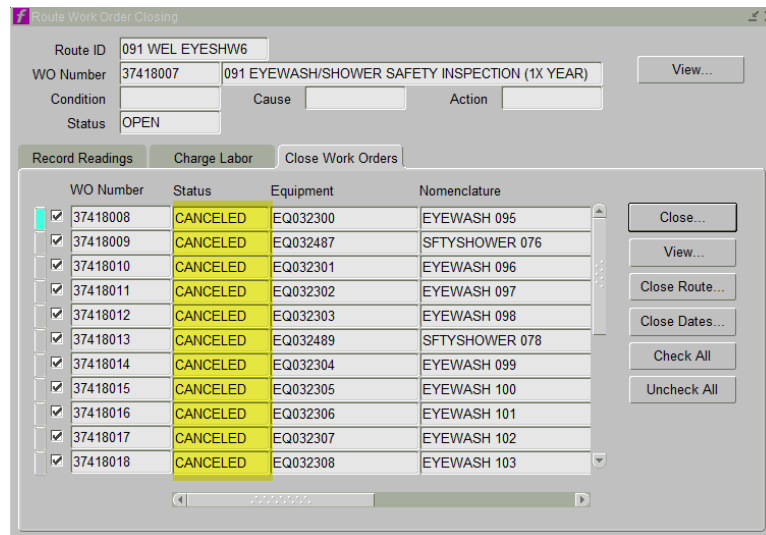


The only options for canceling work orders are the following:

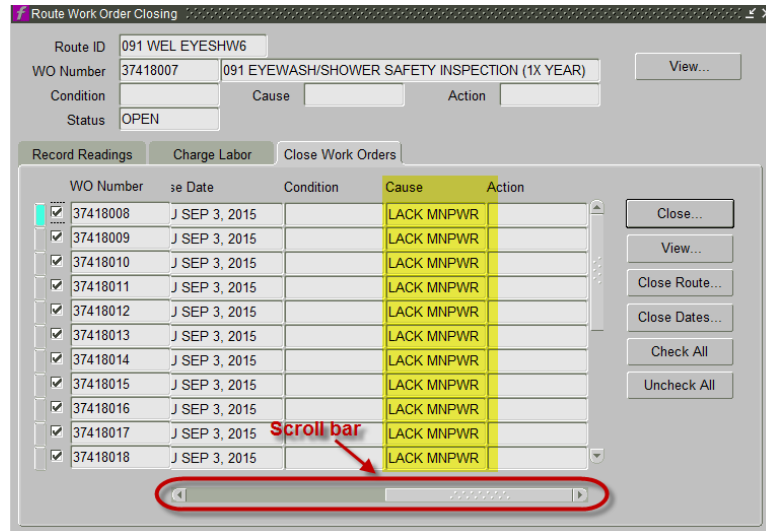
- DUPLICATE CANCELED - DUPLICATE OR SUPERCEDED BY OTHER WO'S
- LACK MNPWR CANCELED - LACK OF MANPOWER
- LACK ACCES CANCELED - SPACE UNAVAILABLE, TOO DISRUPTIVE TO CLIENT,
ONGOING PROJECT
- OWNR REQT CANCELED – FUNDING, OTHER CLIENT REASONS
- EQUIP RETR CANCELED - EQUIPMENT RETIRED, REMOVED
- EQUIP IDLE CANCELED –LOCK/TAG OUT, RED TAGGED BY UT PERSONNEL

3.3.1.7 Confirm all the child work orders have been cancelled with the appropriate “cause” by moving the horizontal scroll bar until the Cause column is shown. (See pic with area shaded in yellow.)

- Cancelled are shown below

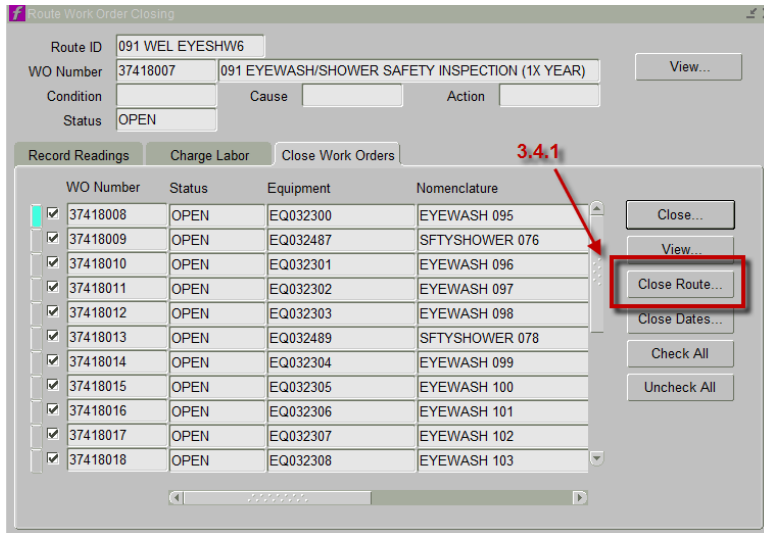


- Cause is shown below



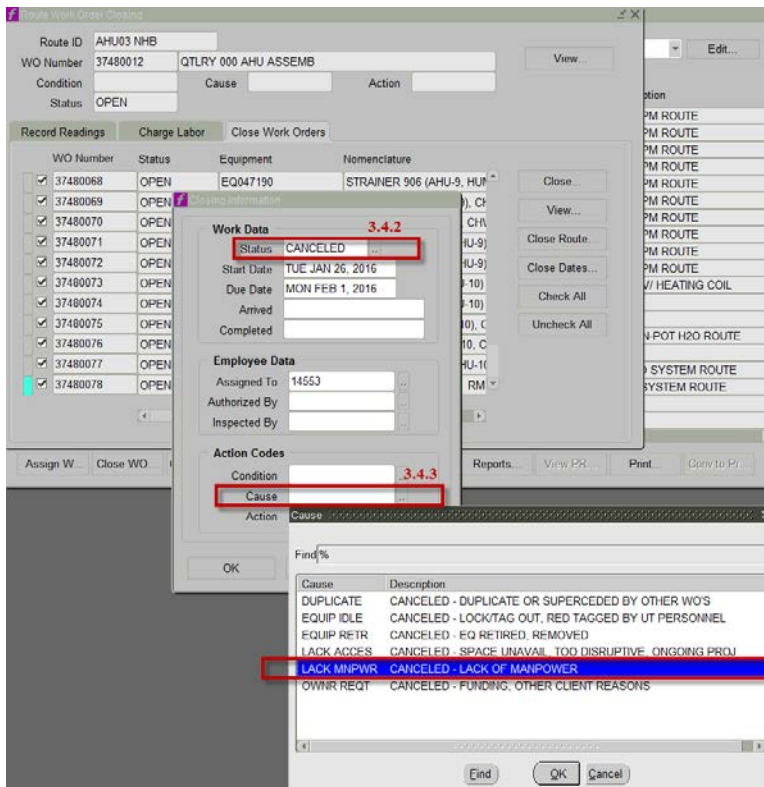
3.4 Close the Parent work order.

3.4.1 Click on the “close route” button. The closing information dialogue button comes up with the following. Proceed with the same process as before.



3.4.2 Change the status to “Canceled.”

3.4.3 Click on the LOV Button and select the appropriate “cause.”

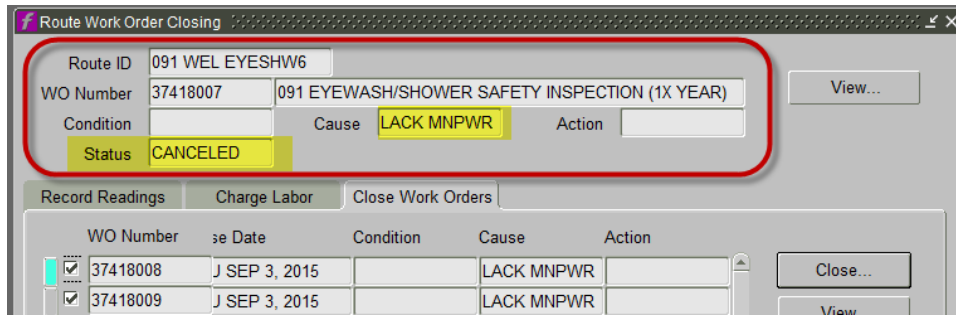


The only options for canceling work orders are the following:

- DUPLICATE CANCELED - DUPLICATE OR SUPERCEDED BY OTHER WO'S
- LACK MNPWR CANCELED - LACK OF MANPOWER
- LACK ACCES CANCELED - SPACE UNAVAILABLE, TOO DISRUPTIVE TO CLIENT, ONGOING PROJECT
- OWNR REQ T CANCELED – FUNDING, OTHER CLIENT REASONS
- EQUIP RETR CANCELED - EQUIPMENT RETIRED, REMOVED
- EQUIP IDLE CANCELED –LOCK/TAG OUT, RED TAGGED BY UT PERSONNEL

3.4.4 Click "OK."

3.4.5 Confirm that the Parent work order has been cancelled with the appropriate "cause". The following shows the header sections for the parent work order. Both the canceled and cause should match.



4. 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>)

- 4.1 [Closing Work Orders](#)
- 4.2 [Work Order Closing Form](#)
- 4.3 [Labor Entry & Closing Route Work Orders](#)
- 4.4 [Closing/Canceling Work Orders for Sec Labor Crews Associate PM and EQ Record](#)

5. 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.

6. 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.	Retired
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.	Retired
Canceling work Orders_09-02-2015.docx	Canceling Work Orders and Routes	9-3-2015	FOM Engineering, Tech, Support	- Renamed cause code, “error” to “duplicate” - Definition remained same. Added section for Cancelling Routes.	Retired
Canceling work Orders_02-01-2016.docx	Canceling Work Orders and Routes	02-01-2016	FOM Engineering, Tech, Support	Added revised “cancelation codes” and associated screenshots.	Released