FACILITIES MANAGEMENT
150 Work Backlog

U153: Work Order Closing
EXAMPLES NEEDED FOR TRAINING

Slide 6: Go through the Work Order Closing form, fields and buttons, etc. Query up a work order with a Status of COMPLETED and close it.

Slide 14: Go through the Route Work Order Closing form, fields and buttons, etc. Query up a Route WO with a Status of OPEN and go through the process of closing a route.

Slide 22: Complete EXERCISE 1 using a work order from EXERCISE 1 of U113 General WO Processing.

Slide 23: Complete EXERCISE 2 by accessing the Daily Schedule form and querying a route work order in the Backlog of the crew the students worked with in EXERCISE 3 of U151 WO Planning and Daily Scheduling and then close the route.

Slide 27: Query up an active standing work order and close it.

Slide 28: From the Work Order Closing form, query W00187878 and go through equipment search process and how you would add the equipment number to the work order before you close it. Remember to clear this information so you can use the work order for subsequent training sessions.

Slide 30: Access the Equipment Where-To-Write Guide at K:\Transformation Team\Implementation Teams\Process Team\Projects & Quick Wins\Where to Write Guides\Where to Write Equipment Guides.xls and explain how it’s used.

Slide 31: From the Work Order Closing form, query up a work order with a Status of COMPLETED and change the Status to CLOSED so the warning pop up appears about changing the completed date. Click NO to retain the previous completed date.

Slide 32: From the Work Order Closing form, query up W001210023 and change the Status to CLOSED to see warning about active POs. Change the Status back to AWAITCLOSE and then right click the work order number and click the POs tab to view the POs that are still active.

Slide 33: From the Work Order Closing form, query up W001241671 and change the Status to CLOSED to see the outstanding materials reservation warning. Click NO when asked to release them, change the Status back to AWAITMATLS, then right click the work order number and click the Parts tab to view active Issue Requests.
U153  WORK ORDER CLOSING

SUBJECTS COVERED IN THIS UNIT:

Introduction .................................................................................. 4
Work Order Closing Form .............................................................. 6
Route Work Order Closing Form ................................................. 14
Closing Regular Work Orders ...................................................... 22
Closing Route WOs .................................................................. 23
Closing Standing WOs ................................................................. 27
Entering Equipment Numbers ...................................................... 28
COMPASS Caution Messages ....................................................... 31
INTRODUCTION

Why should work orders be closed?

- To bring formal closure to the work order
- Remove the work order from the “active” work order backlog
- Prevent further charges from being made to the work order
- Ensure FM reporting is accurate
WORK ORDER CLOSING FORM
1. Access the *Work Order Closing* form from the Navigator screen. Initiate a query to bring up the work order you wish to close. You can also close an individual work order number by right clicking the *WO Number* field from any screen and choosing Close... from the drop down menu to access the *Work Order Closing* form.

2. Review the crews listed on the work order. If there were other crews that were working on this work order, you need to make sure that they are done with the work order also before closing it.

Reference Fields:

**Work Data section:**

- **Status**: Status of the work order; use the LOV to view options.
- **Type**: The type of maintenance required on the work order.
- **Start Date**: The earliest date the work order can begin.
- **Due Date**: The date the work order is due, based on the priority entered on the work order.
- **Arrived**: Not currently being used by FM.
- **Completed**: The date the work order’s Status field was changed to COMPLETED; the default is the current date. However, if changing the status of the work order from COMPLETED to CLOSED, then COMPASS will give you the option to leave the current completed date or change it to the current date.
WORK ORDER CLOSING FORM
3. Review the labor hours applied to the work order to make sure time was taken against it, and to see if the other crews have applied time to the work order. If no time was applied, talk with the people in your crew to find out what the status is of the work order. After a certain period of time, labor cannot be applied to a closed work order; it must be reopened first. View timecard comments from the Labor tab as well.

4. Review the equipment number to make sure the correct number is being used. If the equipment number is blank, click the LOV and perform a search for the correct equipment number and enter it in this field.

Reference Fields:

Equipment Data section: Not currently being used by FM.
- Down: Date and time the equipment was brought down.
- Up: Date and time the equipment was brought up.
- Hours: Number of hours equipment was down; this is automatically calculated.
- Usage: The current usage, up to 12 digits. Usage units are defined in the Equipment form> PM tab> Criteria button.

Employee Data section:
- Assigned To: The employee to whom the work was assigned; not the same as scheduled.
- Authorized By: Not currently being used by FM.
- Inspected By: Not currently being used by FM.
- Performance Codes section:
- Condition: Not currently being used by FM.
WORK ORDER CLOSING FORM

- **WO Number**: W001252452
- **374/RM 330/REPLACE CRACKED SINK**
- **Status**: CLOSED
- **Type**: REPAIR
- **Start Date**: THU NOV 15, 2007
- **Due Date**: MON DEC 17, 2007
- **Completed**: THU DEC 27, 2007 10:21A
- **Equipment**: 374-OPLUM
- **Other Plumbing Fixtures**
- **Down Time**
  - **Down**: 
  - **Up**: 
  - **Hours**: 
  - **Usage**: 
- **Condition**: 
- **Cause**: 
- **Action**: COMPLETED
- **Assigned To**: 
- **Authorized By**: 
- **Inspected By**: 
- **Performance Codes**

**Close Dates**

**Audit**
5. Change the Status field to CLOSED. CLOSED is an “inactive” status, while COMPLETED is an “active” status. Labor and material can still be charged to a COMPLETED work order. Use the CLOSED status when all costs (i.e., Materials, Invoices, Labor) have been charged to the work order. NOTE: If changing the Status from COMPLETED to CLOSED, a COMPASS prompt appears asking if you would like to change the completed date to today’s date; always choose NO so that the original completed date is retained.

6. Select the cause for the repair if applicable; use the LOV button for options. This is required for some repairs like vandalism, power loss, asbestos, fungal, human error.

7. Select the action code for the repair; use the LOV button for options. This is a required field.

8. Emails and notes can be added or sent from the Work Order Closing form by clicking the attachments icon.

9. Click the save/commit icon or press the F10 key after all data has been reviewed and entered.

Reference Tabs:

- Task List: The detailed, long description of the work order.
- Crews: Lists secondary labor crews if any.
- Labor: Lists individual labor entries and timecard comments from line staff that have entered labor hours against the work order.
- Material: Lists all Issue Requests for material.
- Readings: Not currently being used by FM.
WORK ORDER CLOSING FORM
Reference Function Buttons:

- **Close Dates**: Lists the cut off dates for entering charges against the work order.
- **Audit**: Audit of all changes made to the work order along with user names and dates the changes were made.
ROUTE WORK ORDER CLOSING FORM
1. Access the Route Work Order Closing form from the Navigator screen. You can also right click a Parent WO Number from anywhere in COMPASS and choose Close... from the drop down menu to access the Route Work Order Closing form.

2. Query up a parent work order number in the WO Number field.

3. All the child work orders appear on the Record Readings tab; click the Close Work Orders tab to close the child work orders and parent work order.

Reference Fields, Function Buttons and Tabs:

Header section:
- Route ID: The name of the route; this is auto-filled from the work order and cannot be edited from here.
- WO Number: The parent route work order number.
- Unlabeled field: The brief description of the route; this is auto-filled from the work order and cannot be edited from here.
- Condition: Not currently being used by FM.
- Cause: The cause for the repair such as vandalism, power loss, fungal, asbestos, CFC, human error. This field is auto-filled from the work order and cannot be edited here.
- Action: What was the final action of the work order. This field is auto-filled from the work order and cannot be edited from here; it will usually be blank.
- Status: This is the status of the parent work order number only. This field is auto-filled from the work order and cannot be edited here. When the parent work order is closed or completed, the field will automatically be updated.
- View...: Click to view the parent work order detail.
## ROUTE WORK ORDER CLOSING FORM

![Image of Route Work Order Closing form](image-url)

### Graphical User Interface

<table>
<thead>
<tr>
<th>Route ID</th>
<th>174-ICE01</th>
</tr>
</thead>
<tbody>
<tr>
<td>WO Number</td>
<td>W001151781</td>
</tr>
<tr>
<td>Condition</td>
<td>ICE MACHINE/COFFEE MAKER FILTER CHANGES</td>
</tr>
<tr>
<td>Status</td>
<td>OPEN</td>
</tr>
</tbody>
</table>

### Table: Work Orders

<table>
<thead>
<tr>
<th>WO Number</th>
<th>Status</th>
<th>Equipment</th>
<th>Nomenclature</th>
</tr>
</thead>
<tbody>
<tr>
<td>W001151782</td>
<td>OPEN</td>
<td>174-ICE001</td>
<td>ICE MACHINE SERVES 1ST</td>
</tr>
<tr>
<td>W001151783</td>
<td>OPEN</td>
<td>174-ICE002</td>
<td>ICE MACHINE SERVES 2ND</td>
</tr>
<tr>
<td>W001151784</td>
<td>OPEN</td>
<td>174-ICE003</td>
<td>ICE MACHINE SERVES 3RD</td>
</tr>
<tr>
<td>W001151785</td>
<td>OPEN</td>
<td>174-ICE004</td>
<td>ICE MACHINE SERVES 3RD</td>
</tr>
<tr>
<td>W001151786</td>
<td>OPEN</td>
<td>174-ICE005</td>
<td>ICE MACHINE SERVES 3RD</td>
</tr>
<tr>
<td>W001151787</td>
<td>OPEN</td>
<td>174-ICE006</td>
<td>ICE MACHINE SERVES 4TH</td>
</tr>
<tr>
<td>W001151788</td>
<td>OPEN</td>
<td>174-ICE007</td>
<td>ICE MACHINE SERVES 4TH</td>
</tr>
<tr>
<td>W001151789</td>
<td>OPEN</td>
<td>174-ICE008</td>
<td>ICE MACHINE - LIONS RES</td>
</tr>
</tbody>
</table>
Child Work Order Reference Fields:

- **WO Number**: Child work order number.
- **Status**: Status of the child work order.
- **Equipment**: Equipment number for each child work order.
- **Nomenclature**: Brief description of the equipment for each child work order.
- **Condition**: Not currently being used by FM.
- **Cause**: The cause of the repair if any.
- **Action**: The final action of the child work order.
- **Charge Labor Tab**: Can be used to enter labor hours; however, labor is generally entered using the *Labor Timecard* form.
- **Record Readings Tab**: Not currently being used by FM.
- **Readings***: Used to enter equipment readings; not currently being used by FM.
- **View***: To view the checked or highlighted child work order detail.
- **Close Work Orders Tab**:
  - **Close***: Click to bring up the *Closing Information* form for the checked or highlighted child work order so they can be closed or reopened.
  - **View***: Click to view the work order that is highlighted or checked.
  - **Close Route***: Click to close the parent work order. All child work orders must be closed before the parent can be closed.
  - **Close Dates***: To view the cut off dates when labor, material and invoices can be charged to the highlighted or checked work order.
- **Check All**: To check all the child work orders on the route. The system defaults to checking all the child work orders.
- **Uncheck All**: To uncheck all the child work orders on the route.
ROUTE WORK ORDER CLOSING FORM

4. Record Readings
5. Status
6. Work Data
7. Employee Data
8. Action Codes
9. Close Work Orders

Route ID: 174-ICE01
W0 Number: WO01161781 - ICE MACHINE/COFFEE MAKER FILTER CHANGES
Condition: Cause: Action:
Status: OPEN

Record Readings: WO01161781
Status: CLOSED
Equipment: 174-ICE001
Nomenclature: ICE MACHINE SERVICES 1ST

View...
Close...
View...
Close...
Check All
Uncheck All

Work Data:
Status: CLOSED
Start Date: WED APR 4, 2007
Due Date: SUN JUL 1, 2007
Completed: THU DEC 6, 2007 10:2AM

Employee Data:
Assigned To:
Authorized By:
Inspected By:

Action Codes:
Condition:
Cause:
Action: COMPLETED
4. Click the checkbox next to the child work orders you wish to close or use the Check All or Uncheck All.
5. Click the Close... button to access the Closing Information form.
6. Select CLOSED; or use the LOV button for other options. This is what the status will be changed to for all the checked child work orders.
7. Select the cause for the work order repair if applicable (vandalism, asbestos, fungal, CFC, power loss, human error). Use the LOV button to view other options.
8. Select the work order final action, which is usually COMPLETED as planned; use the LOV button to view other options. This is a required field.
9. Click the OK button to return to the Route Work Order Closing form.

Reference Fields:

- Work Data section:
  - **Start Date**: The earliest date when the work could begin.
  - **Due Date**: When the work was due to be completed.
  - **Arrived**: Not currently being used by FM.
  - **Completed**: The default is the current date, however, if the work order status was changed previously to COMPLETED, it may be a prior date.
- Employee Data section:
  - **Assigned To**: The person assigned to the work order; not the same as the person scheduled.
  - **Authorized By**: Not currently being used by FM.
  - **Inspected By**: Not currently being used by FM.
- Action Codes section:
  - **Condition**: Not currently being used by FM.
ROUTE WORK ORDER CLOSING FORM

![Route Work Order Closing Form]

**Route ID:** 174-ICE01

**WO Number:** W001151781

**Status:** OPEN

**Condition:**

<table>
<thead>
<tr>
<th>WC Number</th>
<th>Status</th>
<th>Equipment</th>
<th>Nomenclature</th>
</tr>
</thead>
<tbody>
<tr>
<td>W001151782</td>
<td>CLOSED</td>
<td>174-ICE001</td>
<td>ICE MACHINE SERVES 1ST</td>
</tr>
<tr>
<td>W001151783</td>
<td>CLOSED</td>
<td>174-ICE002</td>
<td>ICE MACHINE SERVES 2ND</td>
</tr>
<tr>
<td>W001151784</td>
<td>CLOSED</td>
<td>174-ICE003</td>
<td>ICE MACHINE SERVES 2ND</td>
</tr>
<tr>
<td>W001151785</td>
<td>CLOSED</td>
<td>174-ICE004</td>
<td>ICE MACHINE SERVES 3RD</td>
</tr>
<tr>
<td>W001151786</td>
<td>CLOSED</td>
<td>174-ICE005</td>
<td>ICE MACHINE SERVES 3RD</td>
</tr>
<tr>
<td>W001151787</td>
<td>CLOSED</td>
<td>174-ICE006</td>
<td>ICE MACHINE SERVES 4TH</td>
</tr>
<tr>
<td>W001151788</td>
<td>CLOSED</td>
<td>174-ICE007</td>
<td>ICE MACHINE SERVES 4TH</td>
</tr>
<tr>
<td>W001151789</td>
<td>CLOSED</td>
<td>174-ICE008</td>
<td>ICE MACHINE - LIONS RES</td>
</tr>
</tbody>
</table>

**Work Data**

- **Status:** CLOSED
- **Start Date:** WED APR 4, 2007
- **Due Date:** SUN JUL 1, 2007
- **Arrived Completed:** THU DEC 6, 2007 10:2AM

**Closing Information**

**Close Route...**

**Close Dates...**

**Close...**

**View...**

**Employee Data**

- Assigned To
- Authorized By
- Inspected By

**Action Codes**

- Condition
- Cause
- Action: COMPLETED

**Buttons:**

- Close
- Cancel
10. If all the child work orders have been closed, then close the parent route work order by clicking the **Close Route...** button.

11. Change the **Status** field to **CLOSED**.

12. Select the cause if applicable; use the **LOV** button for more options.

13. Select the final condition of the work order; generally **COMPLETED** as planned.

14. Click the **OK** button to return to the Route Work Order Closing form.
CLOSING REGULAR WORK ORDERS

EXERCISE 1

1. Access the Work Order Closing form from the Navigator screen
2. Query the work order number used in EXERCISE 1 OF U113 General WO Processing
3. Change the Status field to CLOSED
4. Change the Action field to COMPLETED
5. Click No when the pop-up box to change the completed date appears
6. Click the Save/Commit icon or press the F10 key
CLOSING ROUTE WORK ORDERS

**EXERCISE 2**

1. Access the *Daily Schedule* form from the Navigator Screen
2. Select the crew that you used in *EXERCISE 3* of U151 WO Planning and Daily Scheduling
3. Click the Backlog tab
4. Select the PM WORK ORDERS BY DUE DATE (INCLUDING ROUTE WORK ORDERS)
5. Query “SUPPLY / RET%” in the Description field
6. Right click a work order number from those retrieved and select Close from the drop down menu
7. The Route Work Order Closing form appears
8. Click the Close Work Orders tab
9. COMPASS automatically checks all the child work orders on the route
10. Click the **Close** button to close the checked child work orders
11. In the **Status** field select CLOSED from the LOV
12. In the **Action** field select COMPLETED from the LOV
13. Click the **OK** button
14. Close the parent work order by clicking the Close Route... button (NOTE: All child work orders on a route must be closed before the parent work order can be closed.)

15. In the Status field select CLOSED from the LOV

16. In the Action field select COMPLETED from the LOV

17. Click the OK button and notice how the header Status and the work order Status fields are all changed to CLOSED
Access the *Standing Work Order* form from Navigator screen

Query up the standing work order you wish to close

Change the *Status* field to CLOSED

Click the *Save/Commit* icon or press the **F10** key to save

Always check for active Issue Requests, PREQs and POs before closing SWOs. COMPASS will not warn you when there are active material requests. COMPASS will cancel any active Issue Requests; PREQs and POs can easily be forgotten if the work order is closed.
ENTERING EQUIPMENT NUMBERS

Why should equipment numbers be entered on work orders?
- Assists with reporting
- Provides accurate equipment histories
- Assists with budgeting and planning at the District level
- Makes it easier to query for work orders

How do I know what equipment number to use?
- Query for equipment numbers from the Equipment Search form, which can be accessed from the Work Order Closing form by clicking the Equipment field LOV button
- Use the Where-to-Write Equipment Guide to help identify the correct equipment number to use. It is located at: K:\Transformation Team\Implementation Teams\Process Team\Projects & Quick Wins\Where to Write Guide\Other Guides
**ENTERING EQUIPMENT NUMBERS**

- From the *Work Order Closing* form click the **Equipment** field **LOV**
- Perform an equipment search by location, keyword, or nomenclature
- You can also use the Category or Hierarchy tab to search for equipment
- Highlight the correct equipment number and click **OK**
- The equipment number will be entered in the **Equipment** field of the *Work Order Closing* form

---

<table>
<thead>
<tr>
<th>Equipment</th>
<th>Manufacturer</th>
<th>Nomenclature</th>
<th>Keyword</th>
<th>Site</th>
<th>Building</th>
<th>Floor</th>
</tr>
</thead>
<tbody>
<tr>
<td>142-101</td>
<td></td>
<td>EMERGENCY AND EXIT LIGHTING FOR THE LIGHT EM3</td>
<td>01</td>
<td>142</td>
<td></td>
<td></td>
</tr>
<tr>
<td>142-102</td>
<td></td>
<td>DOORS FOR THIS BUILDING</td>
<td>01</td>
<td>142</td>
<td></td>
<td></td>
</tr>
<tr>
<td>142-103</td>
<td></td>
<td>ROOFS FOR THIS BUILDING</td>
<td>01</td>
<td>142</td>
<td></td>
<td></td>
</tr>
<tr>
<td>142-104</td>
<td></td>
<td>SINKS IN THIS BUILDING</td>
<td>01</td>
<td>142</td>
<td></td>
<td></td>
</tr>
<tr>
<td>142-105</td>
<td>SIMPLEX</td>
<td>SERVICES BUILDING INCLUDES 6 PANELS</td>
<td>01</td>
<td>142</td>
<td>08</td>
<td></td>
</tr>
<tr>
<td>142-106</td>
<td></td>
<td>SERVICES RM 1-371 (RECORD STORAGE RM)</td>
<td>01</td>
<td>142</td>
<td>01</td>
<td></td>
</tr>
<tr>
<td>142-107</td>
<td></td>
<td>SERVICES RM 1-1458A (CANOPY 1458) in IC ALARM FIRE</td>
<td>01</td>
<td>142</td>
<td>01</td>
<td></td>
</tr>
<tr>
<td>142-108</td>
<td></td>
<td>SERVICES RM 1-128A (CHEMICAL STORAGE)</td>
<td>01</td>
<td>142</td>
<td>03</td>
<td></td>
</tr>
<tr>
<td>142-109</td>
<td></td>
<td>BALLASTS FOR THIS BUILDING</td>
<td>01</td>
<td>142</td>
<td></td>
<td></td>
</tr>
<tr>
<td>142-110</td>
<td>AMSCO</td>
<td>SERVICES AUTOCLAVES in RM 1-121A, DE BOILER ST</td>
<td>01</td>
<td>142</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>142-111</td>
<td>AMSCO</td>
<td>SERVICES AUTOCLAVES in RM 1-2305, DE Boiler ST</td>
<td>01</td>
<td>142</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>142-112</td>
<td>COPELAND</td>
<td>SERVICES DX COL IN SUPPLY FAN 142-SUF COND UNIT</td>
<td>01</td>
<td>142</td>
<td>08</td>
<td></td>
</tr>
<tr>
<td>142-113</td>
<td>COPELAND</td>
<td>SERVICES DX COL IN SUPPLY FAN 142-SUF COND UNIT</td>
<td>01</td>
<td>142</td>
<td>08</td>
<td></td>
</tr>
<tr>
<td>142-114</td>
<td>COPELAND</td>
<td>SERVICES WALK-IN REFRIGERATOR 142-AP COND UNIT</td>
<td>01</td>
<td>142</td>
<td>01</td>
<td></td>
</tr>
</tbody>
</table>
### ENTERING EQUIPMENT NUMBERS

Use the *Where-To-Write Equipment Guide* to decide what equipment number to use; this is an Excel spreadsheet.

- Use the tabs on the bottom of the spreadsheet to look up symptoms or to look up the equipment type.
- This is only a guide, go back to the *Work Order Closing* form to enter the correct equipment number.

![Equipment Guide Table](image-url)
When closing a work order that has a **Status** of COMPLETED, this caution message appears.

Always select **No** to retain the original completed date, otherwise COMPASS will replace it with the current date.
COMPASS CAUTION MESSAGES

- Active purchase requisitions and POs must be CLOSED before the work order can be CLOSED
- Right click the WO Number field and choose View/Edit...
- From the Work Order form click the POs tab>Orders button to view all Purchase Requisitions and Purchase Orders
COMPASS CAUTION MESSAGES

- Ensure that all parts ordered are ISSUED before releasing demand
- Right click **WO Number** field and choose View/Edit...
- Click the Parts tab
- Double click the **MD Number**, or with your cursor on the MD Number, click the **View** button to view the entire Issue Request and it’s status
The End!!

😊