**Introduction**:

There are a number of steps that can be reversed in the Service Order Management process, Service Orders can also be cancelled at different stages.  This Job Aid will provide guidance on some reversal steps within the overall end-to-end process that would not normally be used when a Service Order is progressed to its normal completion, as well as how to cancel a Service Order.  These steps include as follows:

- Cancel – different approaches depending on both System & User Status
- Undo Technical Completion

Another step that can be considered as a reversal is when a Service Order is rejected by the FM.07 Approver.  This is covered in detail in the Service Order Approval Job Aid.

There are different triggers, roles, prerequisites and transaction codes required for the different scenarios, hence they will be depicted for each instance.

### A.  Cancel

**Trigger**

You would use these steps in the following circumstances.  If a Service Order has been created and it is no longer required.  Example of this could be that it is a duplicate, more than one Service Order has been created for the same purpose, or the request for service provision has been cancelled by the client.

**Caution**

Service Orders that are Confirmed or Partially Confirmed cannot be cancelled without first reversing the confirmation.  Note, when you reverse any confirmation you are giving any funds already consumed back to the client.

**Roles**

The role that performs these steps is the SD.03: Services Delivery Planner.
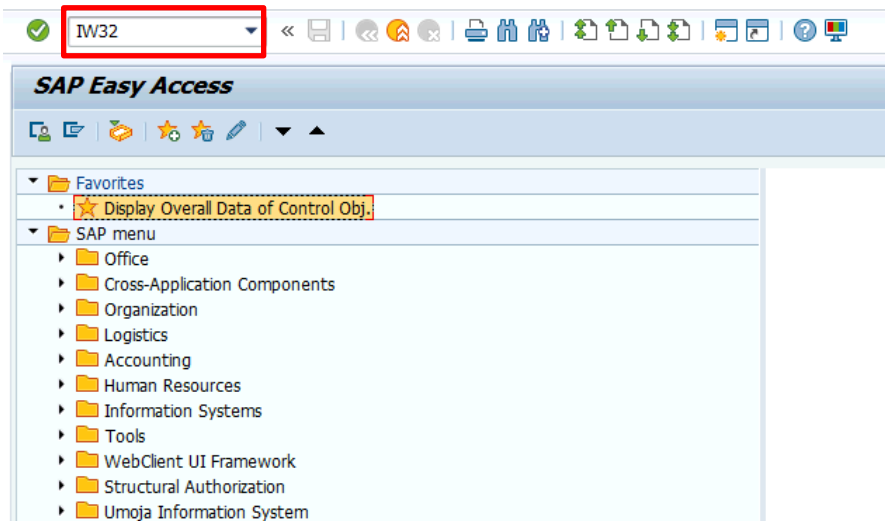
**Prerequisites**

Service Order is Created and in Held or Approved User Status, but not Confirmed or Partially Confirmed – System Status CNF or PCNF.
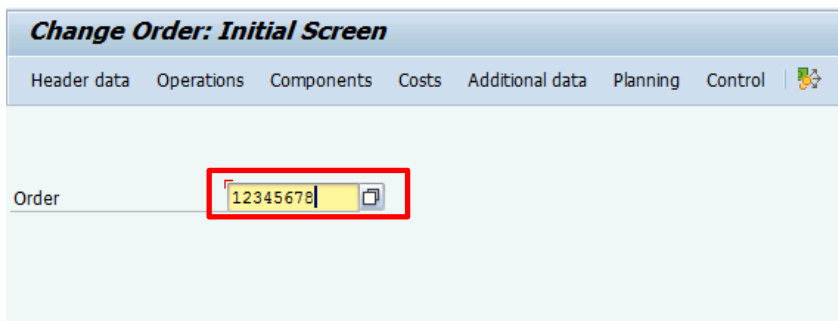
**Transaction Code**

IW32
**Step-by-Step Instructions – Scenario 1 User Status HELD or APPROVED but not Released**
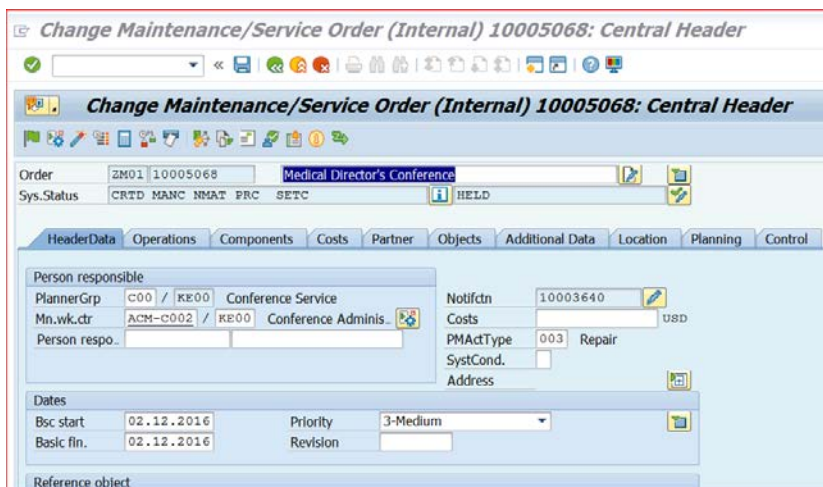
1. Enter IW32 in the Command field and click the Enter icon or press enter.



2. Enter the Order number in the Order field and click enter.



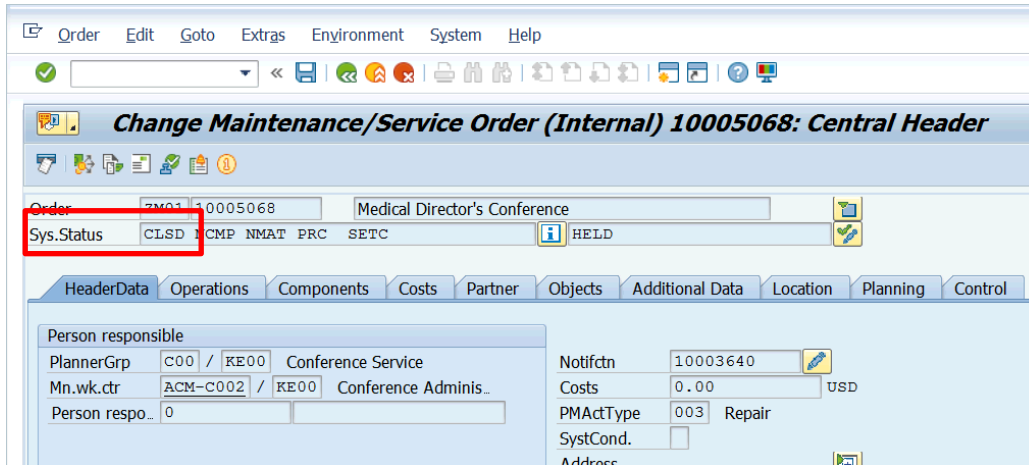3. The Service Order will open in the header tab as per below.

4. With the Service Order open in the Header Tab, click on 'Order' in the top left hand corner of the screen, then on the subsequent dropdowns select as follows; Functions>Complete>Do not execute.
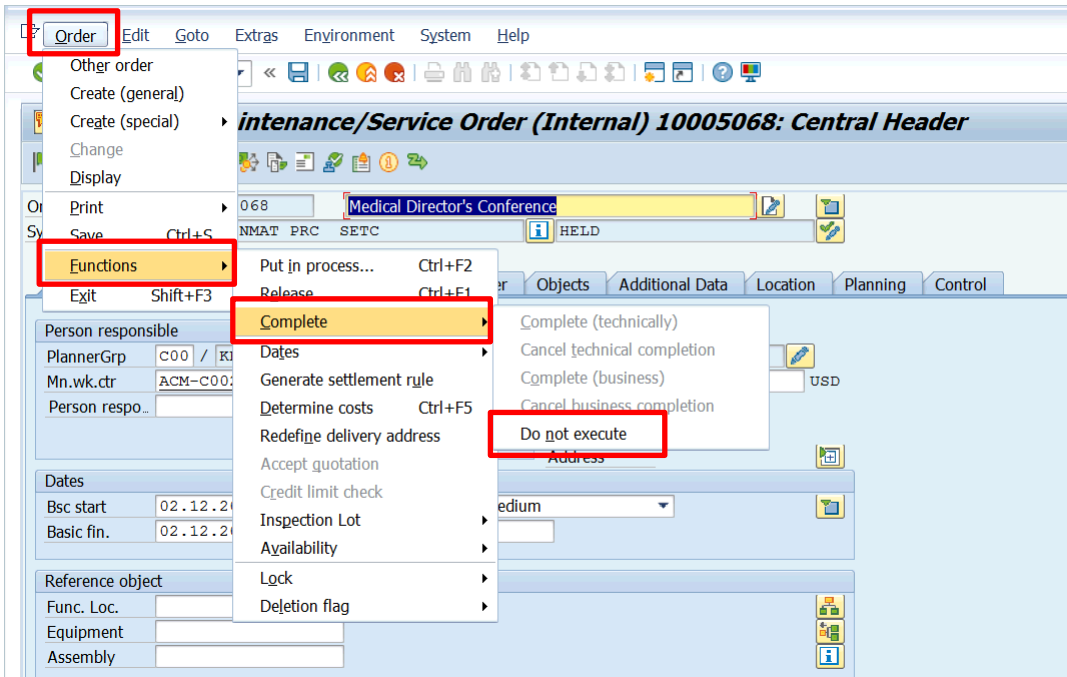


5. When you click on 'Do not execute' the following Confirmation Prompt pop-up appears. Click on Yes and the Service Order automatically closes.
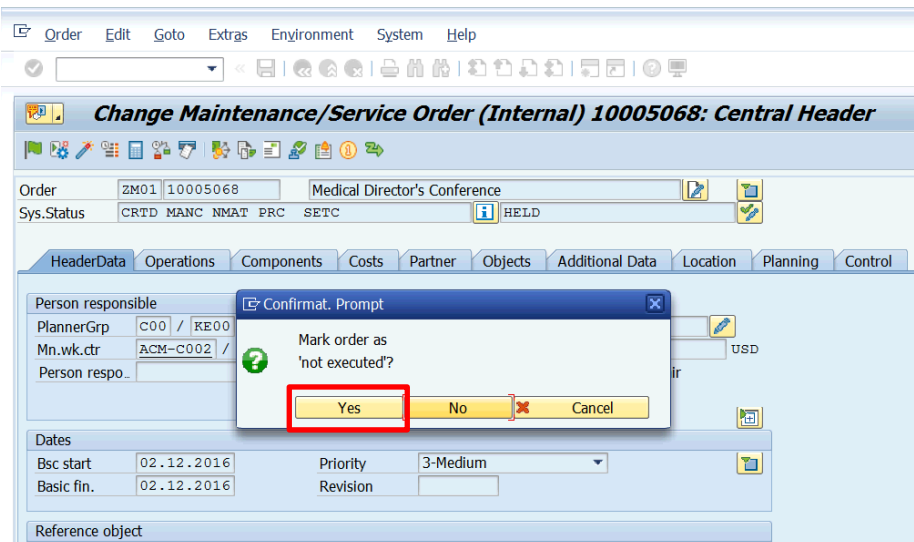


6. If you open the Service Order again using IW33 you will see that the System Status now displays 'CLSD'. This means the Service Order is closed and no further action is required.

7. The same process can be followed if the Service Order has been Approved but not Released.   If the Service Order has been Released, **see Scenario 2 below.**

**Step-by-Step Instructions – Scenario 2 User Status APPR (Approved) & System Status Released (REL)**

8. Use this process if the Service Order is Released but not Confirmed and the service is not going to be provided.  Follow steps 1 to 3 inclusive, when the Service Order opens if it is Released it will appear as follows.
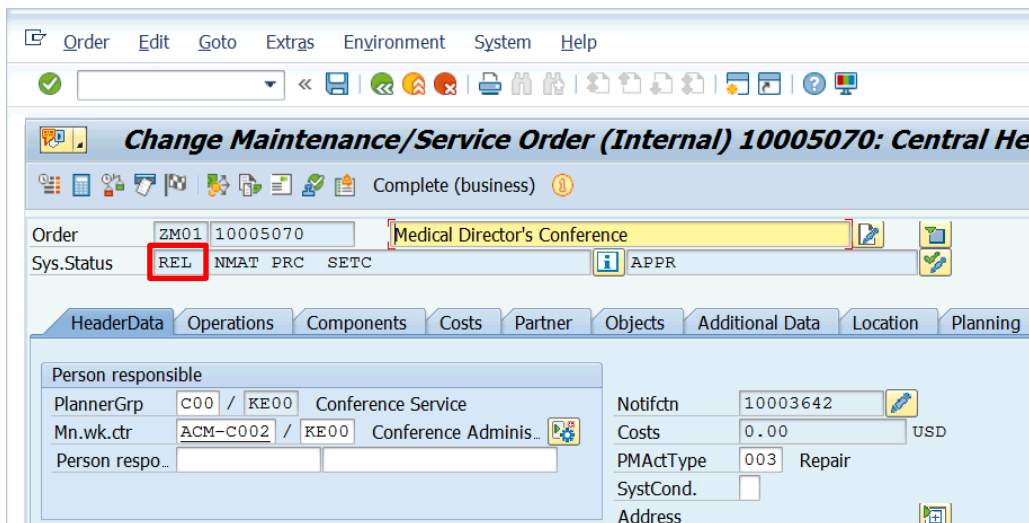
9. To cancel a Released Service Order, that is not confirmed and Components/Goods are not issued (if there are any), click on 'Order' in the top left hand corner of the screen, then on the subsequent dropdowns select as follows; Functions>Complete>Complete (technically) .
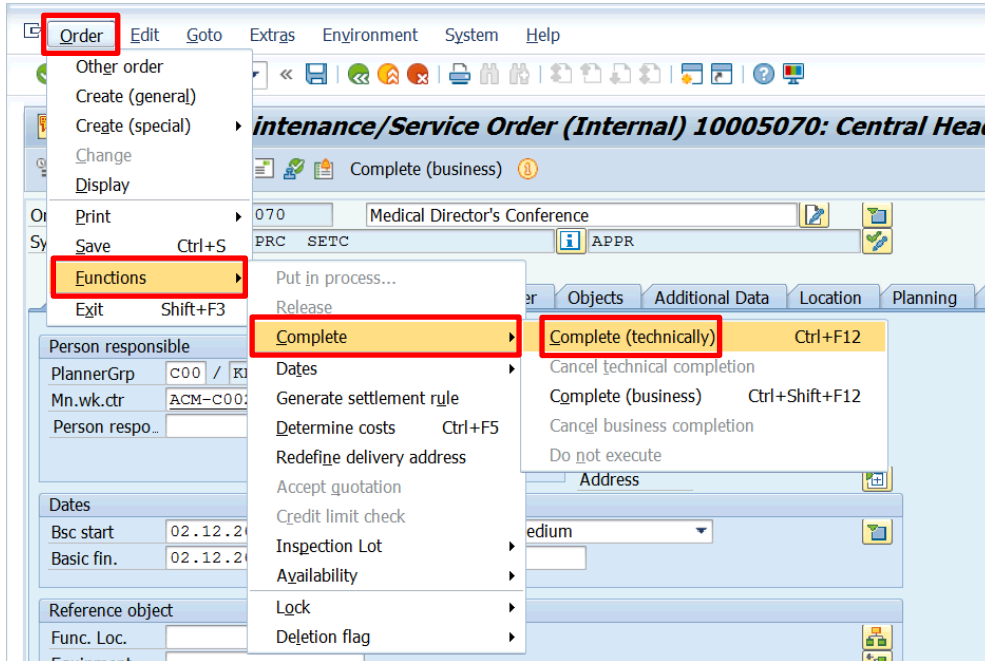


10.  Alternatively, when you have the Service Order open with IW32, click the 'Chequered Flag' as per below.  Both these processes achieve the same end, the order will be Technically Complete (TECO) without any Confirmation, therefore effectively Cancelled.  In both cases you get a 'Complete' pop-up with the date and time, when you Click okay or hit enter the order will close.
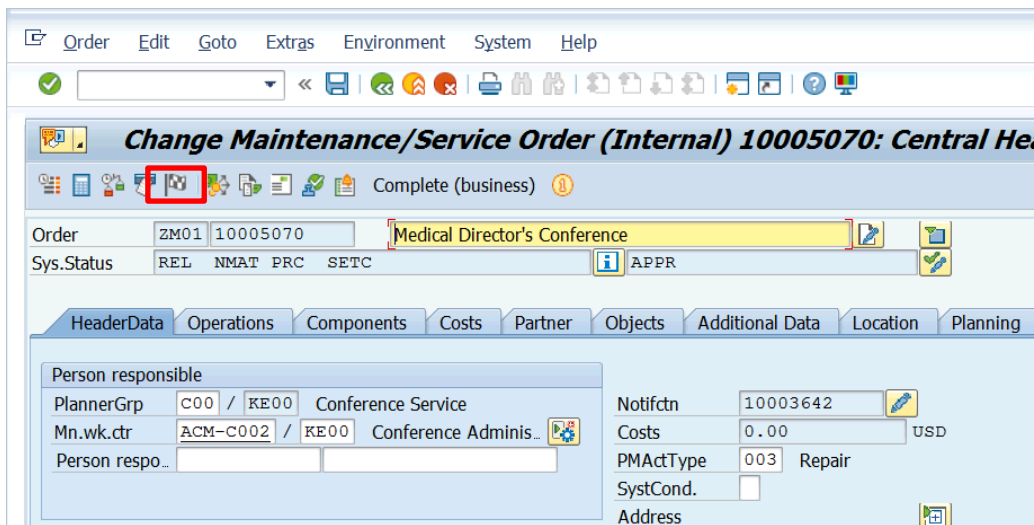
11. If you reopen the Service Order using IW33 it will appear as per below.



**Step-by-Step Instructions – Scenario 3 User Status APPR (Approved), System Status Released (REL) & Confirmed or Partially Confirmed (CNF/PCNF)**

12. In the event that a Service Order has been confirmed or Partially Confirmed but the service is not required, you should proceed as follows.

**Important to note:** As soon as you Reverse/Undo Confirmation(s) any budget consumed from the service recipient's coding block will be returned.

13. To Reverse/Undo Confirmation(s) refer to the specific Job Aid on Service Order Confirmation, it also details how to Reverse/Undo Confirmations.

14. Once the Confirmation is reversed, you should then revert to Scenario 2 above as the Service Order will reflect the same User and System Status.

    **B. Undo Technical Completion**

**Trigger**

An example of when you would use these steps is in the following circumstances.  If a Service Order has been Technically Completed without doing the Confirmation step, hence no consumption of the service recipient's budget and you want to do so, you would use this process. It may also be that you want to change something in the Service Order if you have charged in advance.

**Caution**

It is possible to Technically Complete a Service Order without the Confirmation step, as per 9 above, so Services Delivery Planners should always check before they Technically Complete an unconfirmed Service Order.

**Roles**

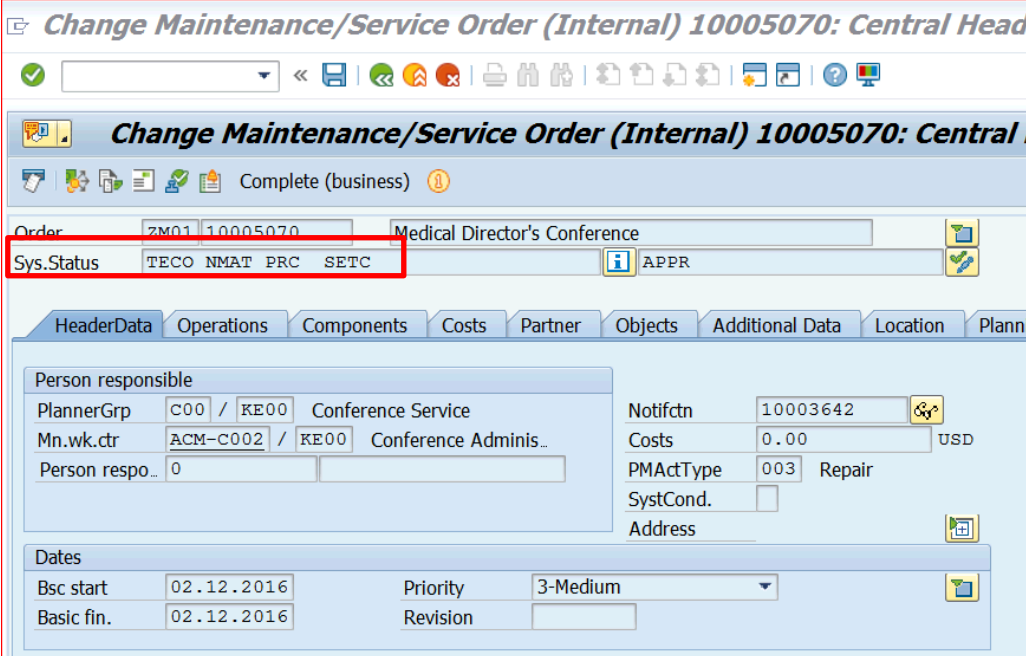The role that performs this step is the SD.03: Services Delivery Planner.

**Prerequisites**

A Service Order has been Technically Completed (TECO).

**Transaction Code**

IW32

**Step-by-Step Instructions**

1. Follow steps 1 to 3 in **A Scenario 1**. When you have the order open it should appear as per below. Note, in this example there is no CNF or PCNF in the System Status field.

2. To undo/cancel the Technical Completion, click on 'Order' in the top left hand corner of the screen, then on the subsequent dropdowns select as follows; Function>Complete>Cancel technical completion.
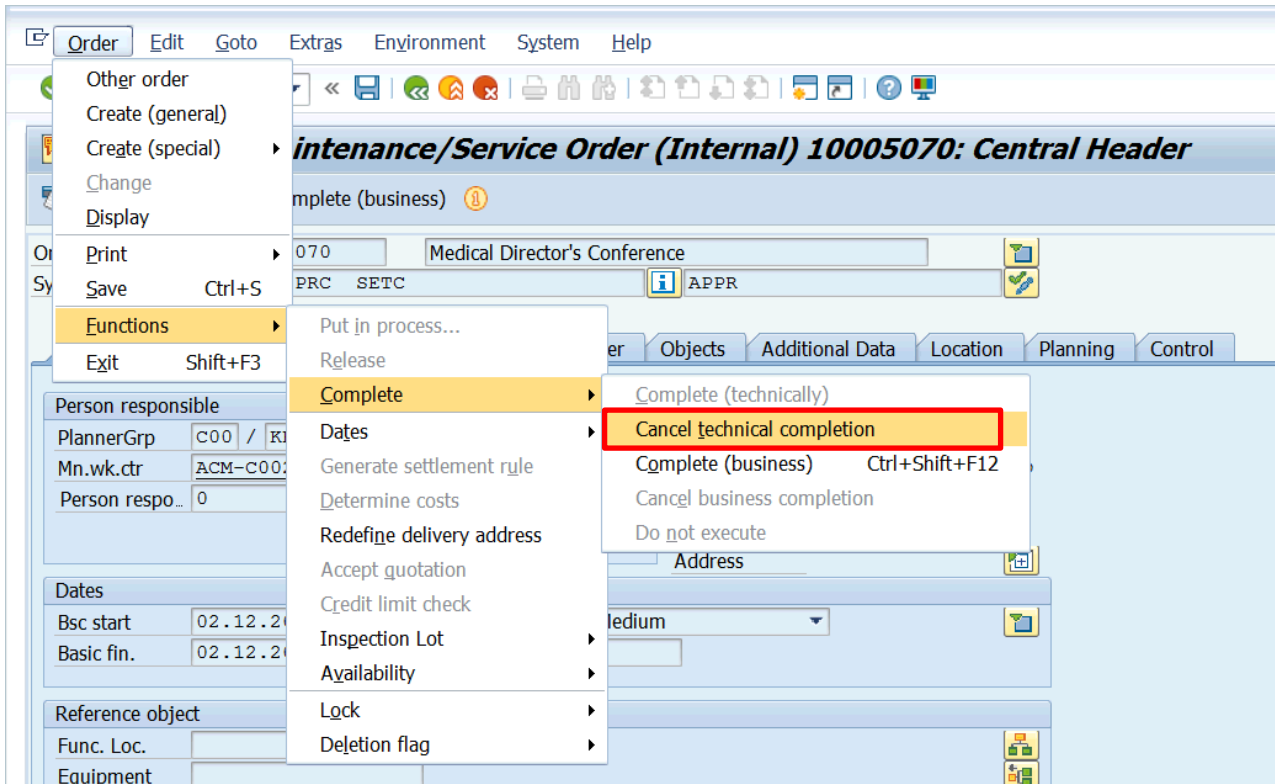


3. When you've clicked on the Cancel technical completion save the Service Order and then you will be able to proceed with the Confirmation as necessary. Follow the steps in the Service Order Confirmation Job Aid.