FACILITIES MANAGEMENT
150 Work Backlog

U155: Inform Program
EXAMPLES NEEDED FOR TRAINING

- There are no exercises in this unit.
U155 INFORM PROGRAM

SUBJECTS COVERED IN THIS UNIT:

- What is INFORM? ........................................  4
- How INFORM Works .................................  6
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WHAT IS INFORM?

A program created by Facilities Management to address customer communication.

- Customers are aware of their work order status
- Customers are notified of delays
- Lowers the amount of customer complaints
- Ultimately results in better customer service
WHAT IS INFORM?

The INFORM program consists of...

- Automated emails sent to the customer upon the creation and completion of their work request
- Manual emails sent by the supervisor or line staff notifying the customer of delays, changes in scheduling, and/or crew changes
- Monthly benchmarking of customer work orders
HOW INFORM WORKS

INFORM WORK ORDER PROCESS

Customer
Customer requests work from FM

Automated
Initial email is sent to customer (email is sent to requestor, alternate requestor, and building contact)

Supervisor (manually handled)
If Due Date is changed, customer is notified

Line Staff or Supervisor
Work is completed (complete box on time card is checked by line staff or WO status field is changed to COMPLETED, CLOSED, AWAITCLOSE, AWAITINVOICE)

Supervisor
Review Current Schedule to identify completed work orders which will send completion email to customer (View: INFORM Completion Emails Which Will be Sent Out Tonight)

Is work really completed?
Yes
Customer receives email letting them know their request has been completed (sent out approx. 24 hours after work order is completed / closed)

No

Supervisor
Removed completed date from work order and change the WO status (from the WO closing form)
HOW INFORM WORKS

INFORM CUSTOMER CUSTODIAL CONCERN (CCC) PROCESS

Customer:
Customer contacts FM with a CCC

Automated:
Initial email is sent to customer (email is sent to the requestor)

Line Staff:
CCC Corrected (work completed)

Supervisor:
Close out CCC Service Request
HOW INFORM WORKS

• Changing Due Dates on Customer Work Orders or Custodial CCC Service Request
  ✓ Contact customer via email, telephone, or in person.

• Canceling Customer Requests
  ✓ Customer does not receive an automatic email upon cancellation; contact customer via email, telephone, or in person.
  ✓ For Work Orders: Change WO Action field to CANCELED (via WO closing form).
  ✓ For CCC Service Requests: Change status to CANCELED (via SR form)

• COMPASS Email Templates
  ✓ Before sending a manual email, make changes to the work order or service request first, this way, the fields for the template will automatically insert your updated information correctly on the email.
    • Due Date Change
    • Cancelled Work Order
    • Parts Ordered
    • Crew Change
HOW INFORM WORKS

Benchmarking results are posted monthly on the [www.facm.umn.edu](http://www.facm.umn.edu) website

<table>
<thead>
<tr>
<th>Performance Statistics</th>
<th>All Districts Combined</th>
<th>District Breakdown</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Current Month</td>
<td>Change from Previous Month</td>
</tr>
<tr>
<td>Preventative Maintenance:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fire/Life/Safety (FLS)</td>
<td>87%</td>
<td>+2%</td>
</tr>
<tr>
<td>Non-FLS</td>
<td>86%</td>
<td>-4%</td>
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<tr>
<td>INFORM:</td>
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<td></td>
</tr>
<tr>
<td>Completed by due date</td>
<td>52%</td>
<td>-26%</td>
</tr>
<tr>
<td>Completed without changes</td>
<td>38%</td>
<td>-18%</td>
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</tbody>
</table>

U155 Inform Program Version 6
Intentionally Blank Slide
HOW INFORM WORKS

How initial INFORM work orders are identified

1. The work order needs to have a requestor which is identified as a customer *(department field is populated with CUSTOMER, OCM_CUST, or NTS_CUST)*.

2. The requestor on the work order needs to have an email address.

3. The primary crew on the work order needs to be flagged as an INFORM crew *(all district and sign shop crews are flagged as INFORM crews)*.

When are initial INFORM work orders emails sent out

1. A process looks for any INFORM work orders (as identified above) which have been created (work order number assigned) more than 5 minutes ago and are less than 24 hours old.

2. This process looks for these INFORM work orders and sends out emails every 15 minutes.
HOW INFORM WORKS

How are completed INFORM work orders identified

The same criteria is used in the identification of the initial INFORM work order emails. *With the addition of the following:*

1. Work Order Status is CLOSED

   OR

   Work order status is one of the following (COMPLETED, AWAITSCLOSE, AWIATINVOICE) and work order completion date is over 24 hours old.

2. Work order has NOT been canceled.

3. Work Order Completion date is less than 7 days old.

When are completed INFORM work orders emails sent out

1. A process runs which looks for completed INFORM work orders (as identified above) and sends the customer’s a completion emails.

2. This process runs at approximately 11:00 pm each night.
HOW INFORM WORKS

How initial INFORM CCC service requests are identified

1. The service request needs to have a requestor which is identified as a customer (*department field is populated with CUSTOMER, OCM_CUST, or NTS_CUST*).

2. The requestor on the service request needs to have an email address.

3. The primary crew on the service request needs to be flagged as an INFORM crew (*all district and sign shop crews are flagged as INFORM crews*).

4. CCC needs to be present in the Non-Available Time field.

When are initial INFORM CCC service requests emails are sent out

1. A process looks for any INFORM CCC service request (as identified above) which is less than 7 days old.

2. This process looks for these INFORM CCC service requests and sends out emails every 15 minutes.
HOW INFORM WORKS

How to view INFORM Emails

1. Open the Work Order.
2. Click on the email attachment.
3. Click on the View button.
4. Select the email to view.
1. Click the **attachments** icon located on the upper right hand of the Work Order or Service Request form and the Attachments form appears.

2. Click the Mail tab and a summary of all emails sent from the work order appear.

3. Click the **View** button to view the entire contents of the email.

4. Click the **New** button to create a new email.

Reference Fields:

- **Send Date**: Date the email was sent.
- **Sender**: Email address of the person who sent the email. Auto-generated emails have an email address of FM@facm.un.edu
- **Subject**: Text that was entered on the subject line of the email.
- **Recipient**: Email address of the person receiving the email.
5. Click the LOV button for the **Template** field and choose from a list of templates. This field can also be left blank if desired.

6. Click the LOV button for the **To** field and the **Recipients** form appears.

7. Highlight one of the recipients and click the To, Cc, or Bcc buttons to move them to one of the recipient boxes on the right.

8. Or click the **Requestors** button to perform a query on non-FM employees in the COMPASS system or click the **Employees** button to perform a query on FM employees only.

9. Click the **OK** button when all recipients have been chosen.

10. Edit the **Subject** field if needed.

11. Edit the message text if needed.

12. Click the **Send** button to send the email.

**Reference Fields:**

- **Cc:** Use the **To** field to choose your Cc recipients.
- **Attachments** tab: Not currently being used by FM.
Supervisors

- Always click NO if this pop-up appears when closing work orders. This will preserve the completed date already posted to the work order.

- Review the backlog often by using the CUSTOMER REQUESTED WORK ORDER Views when Daily Scheduling.

- Communicate with line staff on a daily basis to get updates on customer work orders.

- Communicate with customers when there are delays with their work requests (parts ordered, short staffed, scheduling issues).
INFORM TIPS

Line Staff

• Enter a daily timecard and check the Work Done? checkbox next to the work order if it’s complete. This will add the completion date to the work order and trigger a completion email to the customer 24 to 36 hours later.

• Adding timecard comments like: *refer to carpenters, parts ordered, will be done on 7/26*, provides valuable information related to the job that can be passed along to the customer by the supervisor.
The End!!!

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