FACILITIES MANAGEMENT
150 Work Backlog

U157: Advanced Backlog Management
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WHAT IS BACKLOG MANAGEMENT?

Backlog Management is the “science” of moving work through the stages of the work order life cycle in an efficient manner.

WORK ORDER LIFE CYCLE

WORK INITIATION
(Service Request, Web Request, PM Generation)

WORK ORDER PLANNING

WORK ORDER SCHEDULING

WORK PERFORMED

WORK ORDER CLOSURE
BACKLOG MAKE UP

• Industry standard for backlog size is between 4 and 6 weeks of work in the backlog at one time.

• Depending on the crew, the backlog would consist of:
  • Approximately 2-3 weeks non-PM work
  • Approximately 2-3 weeks PM work

• Of the 2-3 weeks of non-PM work, it would be appropriate to have at least 1 week of this work planned and ready to go, and the remaining 2 weeks unplanned.
The work order backlog consists of repair work orders, PM work orders, project work orders, and administrative work orders.

PM work orders are generated weekly; a WO backlog can increase up to 30% after a PM run, especially in spring or fall with HVAC related PMs.
EVALUATING THE BACKLOG

The work order backlog can be managed from the Daily Schedule Backlog screen or the Current Schedule screen. The differences between the two are.....

**Daily Schedule Backlog**
- 15 work orders displayed at one time
- Daily Scheduled WOs can be viewed
- Scheduling history available
- Similar WO search available
- Child WOs are not viewable
- WOs must be assigned one at a time
- Daily Scheduling reports available
- Minimal reports for evaluating backlog

**Current Schedule Backlog**
- 19 work orders displayed at one time
- Daily Scheduled WOs cannot be viewed
- Scheduling history unavailable
- Similar WO search unavailable
- Child WOs are viewable
- Multiple WOs can be assigned at one time
- Daily Scheduling reports unavailable
- Numerous reports available for evaluating backlog
To view the total number of records in a backlog view or query, click the **Last** icon on the toolbar to be brought to the last record.
EVALUATING THE BACKLOG

- Utilize public views already set up to analyze your backlog.
- Create private views to assist with analyzing your backlog.
- You can query further on your views if needed.
EVALUATING THE BACKLOG

• Query the following fields to answer your questions....

  • Which WOs need to be held until parts are received? (Status)
  • What work is for the same equipment? (Equipment)
  • Which work orders are old or past due? (Due date)
  • What work orders are complete and can be closed? (Status)
  • What WOs require other crew involvement? (Sec. Labor box)
  • Which are PMS and which are customer requested? (Type)
  • What work orders are urgent? (Priority)
BACKLOG PRIORITIZATION

- Facilities Management has 3 categories of “programmed” maintenance:
  1. Regulatory (fire/life/safety)
  2. Critical equipment and systems
  3. Selective global tasks

- Priorities to follow for “Selective” global tasks are:
  - Safety
  - Liability/risk/exposure
  - Academic (customer) programming
  - Environmental system repairs
  - Long range (future) plans
  - Building use intensity

- Balance the following factors when scheduling:
  - Priority of work - safety before routine
  - Criticality of equipment or location - A/C outage vs. tap leaking
  - Efficiency of work - same location vs. multiple locations
  - Customer service impact - lamp burnt out above work area vs. lamp burnt out in hallway
BACKLOG MANAGEMENT

✓ Review backlog frequently throughout the day
  • Dispatch urgent work orders to line staff
  • Reassign work orders if assigned to the wrong crew so the correct crew can attend to the work order in a timely fashion
  • Contact customer for additional information or to verify urgency
Close work orders as soon as they are completed

- A backlog with fewer work orders is easier to manage
- There is always the possibility that the WO left open when it’s COMPLETED will inadvertently be charged more labor
✓ Update the **Status** of work orders regularly
  
  • It’s easier to analyze a large backlog at a glance when there are current statuses assigned to each work order.
  
  • Queries can be performed on the work order **Status** and/or views can be created to sort by the **Status** to manage the work orders more efficiently.
All FM codes can be viewed and are explained at the following web page: [http://www.facm.umn.edu/bas/origionaldoclibrary/fmcodes1.html#1](http://www.facm.umn.edu/bas/origionaldoclibrary/fmcodes1.html#1)

<table>
<thead>
<tr>
<th>WO STATUS</th>
<th>APPLICATION</th>
<th>WO STATUS</th>
<th>APPLICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVE</td>
<td>Work is progressing</td>
<td>CUSTHOLD</td>
<td>Customer put job on hold</td>
</tr>
<tr>
<td>ASSIGNED</td>
<td>Work is assigned to an employee</td>
<td>DESIGNPRO</td>
<td>Design is progressing</td>
</tr>
<tr>
<td>AWAITCLOSE</td>
<td>Field work is complete, pending material restocking or invoice approval</td>
<td>HOLD</td>
<td>FM supervisor put job on hold</td>
</tr>
<tr>
<td>AWAITMATLS</td>
<td>Waiting for materials to arrive before work can proceed</td>
<td>INPLANNING</td>
<td>Job requires planning before it can proceed</td>
</tr>
<tr>
<td>AWT FUND</td>
<td>Waiting for funding</td>
<td>OPEN</td>
<td>This is a new work order</td>
</tr>
<tr>
<td>AWT INVOICE</td>
<td>Waiting for invoice from vendor</td>
<td>OTHERACT</td>
<td>Waiting for work to be performed by another crew or unit</td>
</tr>
<tr>
<td>BID DUE</td>
<td>Bid is being formulated</td>
<td>PROCEEDING</td>
<td>Work is progressing with charges applied to the work order</td>
</tr>
<tr>
<td>CLOSED</td>
<td>Work and reporting are finished</td>
<td>READY</td>
<td>Work is ready to be assigned and scheduled</td>
</tr>
<tr>
<td>COMPLETED</td>
<td>Field work is done and work order can be closed</td>
<td>SCHEDULED</td>
<td>Work has been scheduled</td>
</tr>
</tbody>
</table>
Daily schedule emergency WOs to the employee assigned to respond

- Scheduling the WO automatically changes the Status to SCHEDULED.
- The line staff and supervisor don’t have to waste time looking for a WO number later in the day for the employee’s timecard.
✓ Schedule PMs with time to spare
  • Waiting until the last minute to complete PMs inevitably results in overdue PMs.
  • Scheduling PMs in advance makes the line staff aware of the PMs that are due and allows assignment during slack times or between jobs.
Review the Daily schedule with crew before the close of each day and review the entire backlog periodically with crew

- To update the crew on upcoming jobs so they can prepare for them.
- The crew may have suggestions for efficiently scheduling the jobs together and vice versa.
- The crew may have other knowledge of a job that the supervisor is not aware of and vice versa.
- To communicate status’ of jobs and roadblocks with completing jobs.