CASE STUDY

Lewisville Independent School District Harnesses Robust Work Order Management and Reporting

with Siemens Asset Management Software

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Accessing Detailed Analytics

Lewisville ISD previously used Siemens MaintenanceDirect to track facility work orders, but the team wanted a more robust program that would allow for more detailed information and analysis. After transitioning to Asset Essentials, Lewisville has been able to input more specific data about each work order and draw on robust analytics to better understand the maintenance team's work, set goals and track progress.

One aspect of Asset Essentials that intrigued the Lewisville ISD team is the potential for more detailed assignments and tracking. For example, unlike MaintenanceDirect, Asset Essentials makes it possible to assign multiple technicians to one work order or assign multiple locations or campuses to one work order, says Tiffany Pankonien, Service Response Center and Distribution Supervisor. Also, where MaintenanceDirect allows users to break work orders down by the building, Asset Essentials allows users to drill down further.

"You can run a report on just one restroom or fieldhouse, which makes it easier to find what you need, such as break down the area where we have the most HVAC issues," Pankonien says. "Breaking things down more within a facility allows us to see where exactly we're spending our time and resources."

The detailed data available in Asset Essentials isn't just available to central office staff. Each zone and department has the ability to access the data and reports they need. "They can break down their reports by individual technicians, or by all their technicians to see how many work orders they have coming in," Carolyn Mutschler, Service Response Center and Distribution Manager.

Customer: Lewisville Independent School District (ISD), Texas

Vitals: City School District with:

- Approximately 50,000 students
- Five high schools, four freshman centers, 15 middle schools and 39 elementary schools
- Service area covering thirteen municipalities and 127 square miles

Challenges: Lewisville, Texas, a fast-growing Dallas suburb, experienced an 8% increase in population from 2016 to 2021, and the number of available housing units grew 16% in 2022. The local school district has grown along with the population, and now maintains 69 campuses across 127 square miles. Lewisville ISD needed a software solution that would help to accurately track work orders for building maintenance and allow for customization to meet the district's individual goals.

Results: By maximizing the use of Siemens Asset Essentials, Lewisville ISD has been able to:

- Access detailed analytics to set and progress toward maintenance goals
- Customize work orders and reports to drill down to specific detailed information
- Boost efficiencies by updating work orders on the go
- Glean accurate data to inform budgets and justify hiring decisions

Boosting Efficiencies

When Lewisville first transitioned to Asset Essentials, a number of team leads were still entering notes and time for all their technicians. Today, that's no longer necessary, as all technicians are using the Asset Essentials app to enter their own notes and time from the field.

"We don't have to wait until the end of the day for leads to enter all that paperwork so we can see the progress made," Pankonien says. "Our techs can do it on their smartphones or tablets, and we can immediately see what's happening."

Because Asset Essentials also provides easy access to historical data, managers can more effectively plan for upcoming work based on past information. "We now have three full years of data," Mutschler says. "When managers see that, they can easily see the trends, such as higher volume of work orders in May and August, and more time to work on more labor-intensive projects during the summer. That helps to schedule work efficiently."

With access to such detailed data, the maintenance department has set lofty goals of completing 80% of reactive work orders in seven days or fewer and 85% of preventive maintenance in 30 days or fewer. The team is able to regularly retrieve current data to measure their progress toward these goals and analyze any roadblocks toward meeting them.

Customizing Work Orders and Reports

Pankonien has designed all Lewisville ISD work orders and reports, adding color to differentiate among departments, for instance, to make it easier to sort and find data. "I like that I can make the software work for me and I'm not put into a box," Pankonien says. "It's completely customizable with how Lewisville ISD would like to use the program, and the way we do things doesn't have to be the way someone else does things."

To ensure the validity of its data, Lewisville ISD has instituted a robust audit trail for every work order. For example, a work order might start as a flooring issue, but if a leak is uncovered, it turns into a plumbing issue. After each work order is closed, central office staff follow up on the work done and make sure it is coded correctly, attaching any relevant invoices, purchase orders and other documentation. "We want to make sure all information is accurate so we aren't running reports on bad information," Mutschler says.

Supporting Budgets and Hiring Decisions

At the end of every school year, Lewisville ISD runs a work order report from Asset Essentials to build its facilities assessment. The school board uses that assessment to plan and budget for bond projects.

Facilities department leaders also use reports from Asset Essentials to justify requests for new full-time positions. "If you have 1,000 work orders in a month and a report that breaks down those work orders by trade, it's easy to see trends among the ones that have been open for 60 days," Mutschler says. "We may not have enough help in certain trades. Our executive director takes those reports to upper management to justify adding new positions."

Learn more: **assetmanagement.siemens.com**

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>
> **Carolyn Mutschler,**
> Service Response Center and Distribution Manager, Lewisville ISD

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