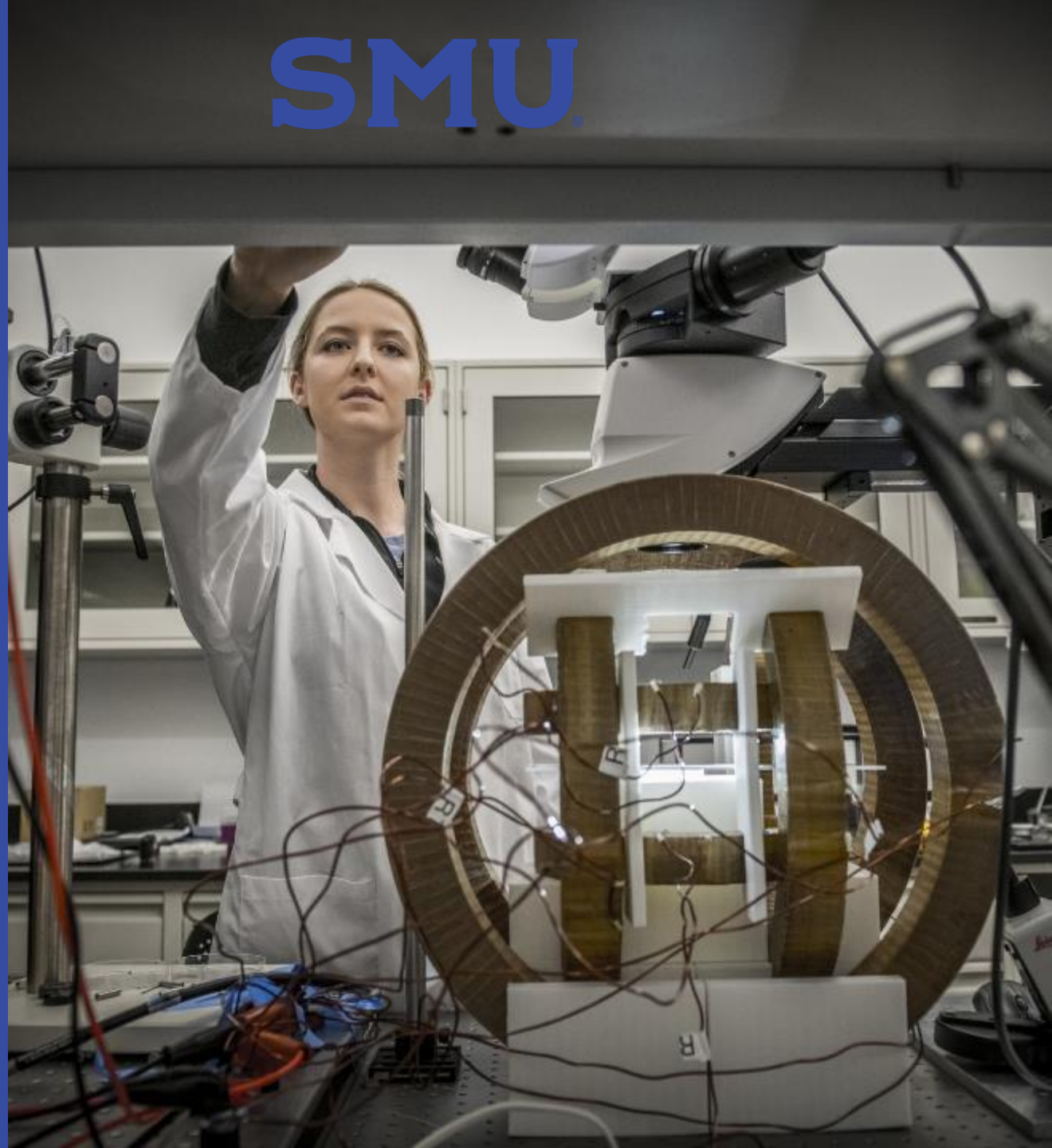


SMU

**DRIVING COMPREHENSIVE CHANGE AND  
ELEVATING SERVICE ON A UNIFIED PLATFORM**

*Allison Day  
Jason Fenimore  
Rachel Mulry*

SMU®





# About SMU

- **Private research university in Dallas, Texas**
- **Over 12,000 students**
- **R1 University**
- **Member of the ACC**
- **Main Campus located on 234 acres in the heart of Dallas**

# Where it began: 2020



## Event Management

EMS  
Paper Forms  
Departmental/distributed  
process



## Room Reservations

Ad Astra  
Outlook  
Libcal  
Paper



## Tickets/Requests

TMS  
iSupport  
Microsoft Forms to email  
Email boxes



## Space Management

Excel files



## Asset Management

PeopleSoft  
iSupport  
Spreadsheets



## Real Estate Management

Rent Manager

*“Sorry, we don’t do that. You need to contact department X with system Y.”*

*“We have an opportunity...”*

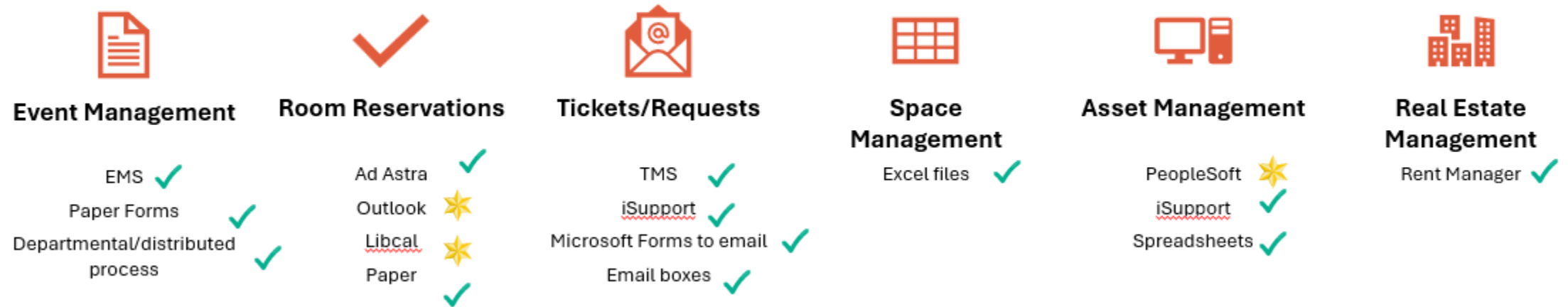
# IWMS: Integrated Workforce Management Solution



- Integrated suite of multiple applications
  - Space Management
  - Work Order Management
  - Real Estate Management
  - Room Scheduling
- Integration with existing SMU Systems
  - PeopleSoft
  - Office365
  - SQL databases
- Delivers robust capabilities for
  - Reporting and Analytics
  - Strategic Planning
  - Room scheduling/Event management
  - Business Process Alignment
  - Service management
- Customer Service Improvements
  - Centralized portal
  - Internal routing to the right people
  - Consistent communication tools

Product selected: Planon  
Branded as STABLE:  
Supporting Technology, Assets, Buildings, Logistics, and Events

# After the initial launch...2023



Multiple integrations with various systems and reduction of 6 enterprise software packages and many email/manual processes

★ Still in use but integrated

# STABLE Modules at SMU

Property and Space management	Ticketing	Preventative Maintenance	Stock and Warehouse	Asset Management	Key Management
Event Management	Room Reservations	Change Management	Problem Management	CMDB	Tools and Equipment Reservations
Financial Management	Mobile application	Health and Safety	Real Estate Management	Fleet Management	Grant Space Management

# Organizations on STABLE

## **Finance**

- Purchasing
- Financial Services
- Payroll
- Capital Assets

## **Campus Services**

- Dining Services
- Campus Services
- Catering
- Parking and ID cards
- Conference services

## **Student Affairs**

## **Information Technology**

## **Campus Safety**

- SMU Police
- Risk Management

## **Public Affairs**

## **Facilities**

## **Enrollment Services**

## **Research**

## **All Departments/All Schools**

- Building Managers
- Room Approvers
- Event Partners

Approximately 31% of our full-time employees are managing processes within STABLE.

In 2025, there were 18,022 UNIQUE SMU requestors in the system. Non SMU requests (via email) were not counted

# Design Driven by Process:

# Event Management

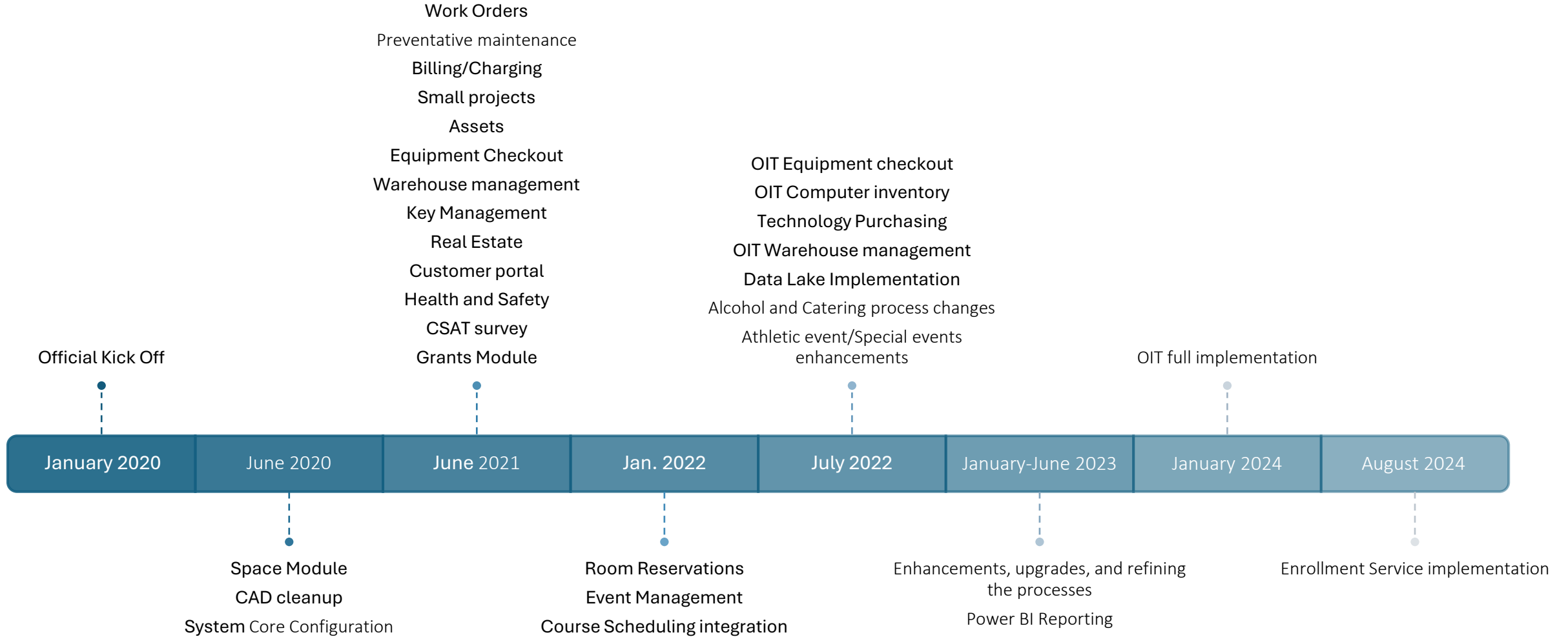
## **Modules**

- Room Reservations
- Ticketing
- Workflow/Forms
- Assets
- Equipment Check out
- Financial Billing

## **Departments**

- Student Affairs
- SMU PD
- Risk Management
- Purchasing
- Catering
- Dining Services
- Conference Services
- Facilities
- AV/OIT
- Finance
- Building Managers

# STABLE timeline



# Project Focus: Not an IT Project



Process mapping



Communication



Training

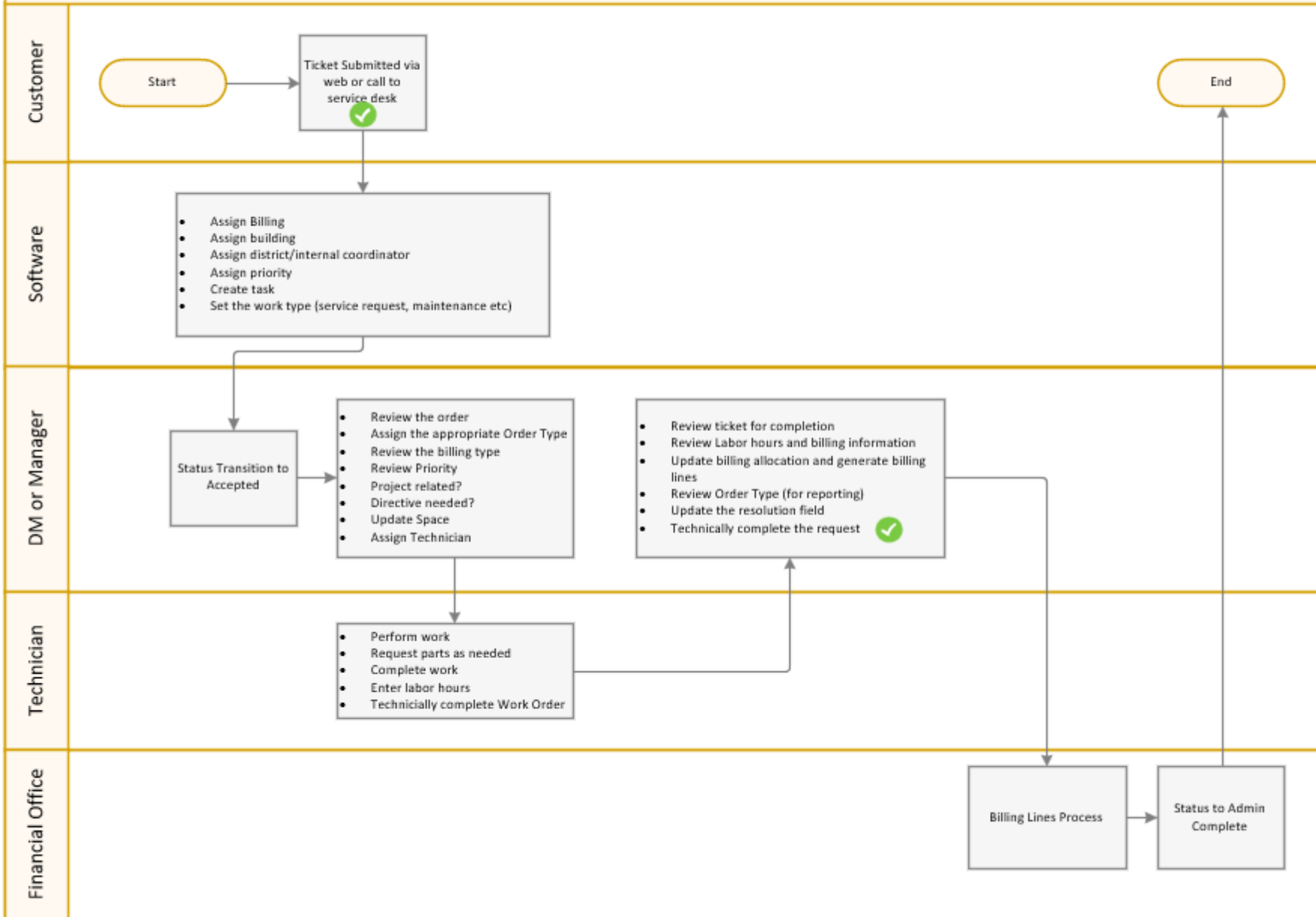


Checkpoints and periodic service reviews

## Lessons Learned

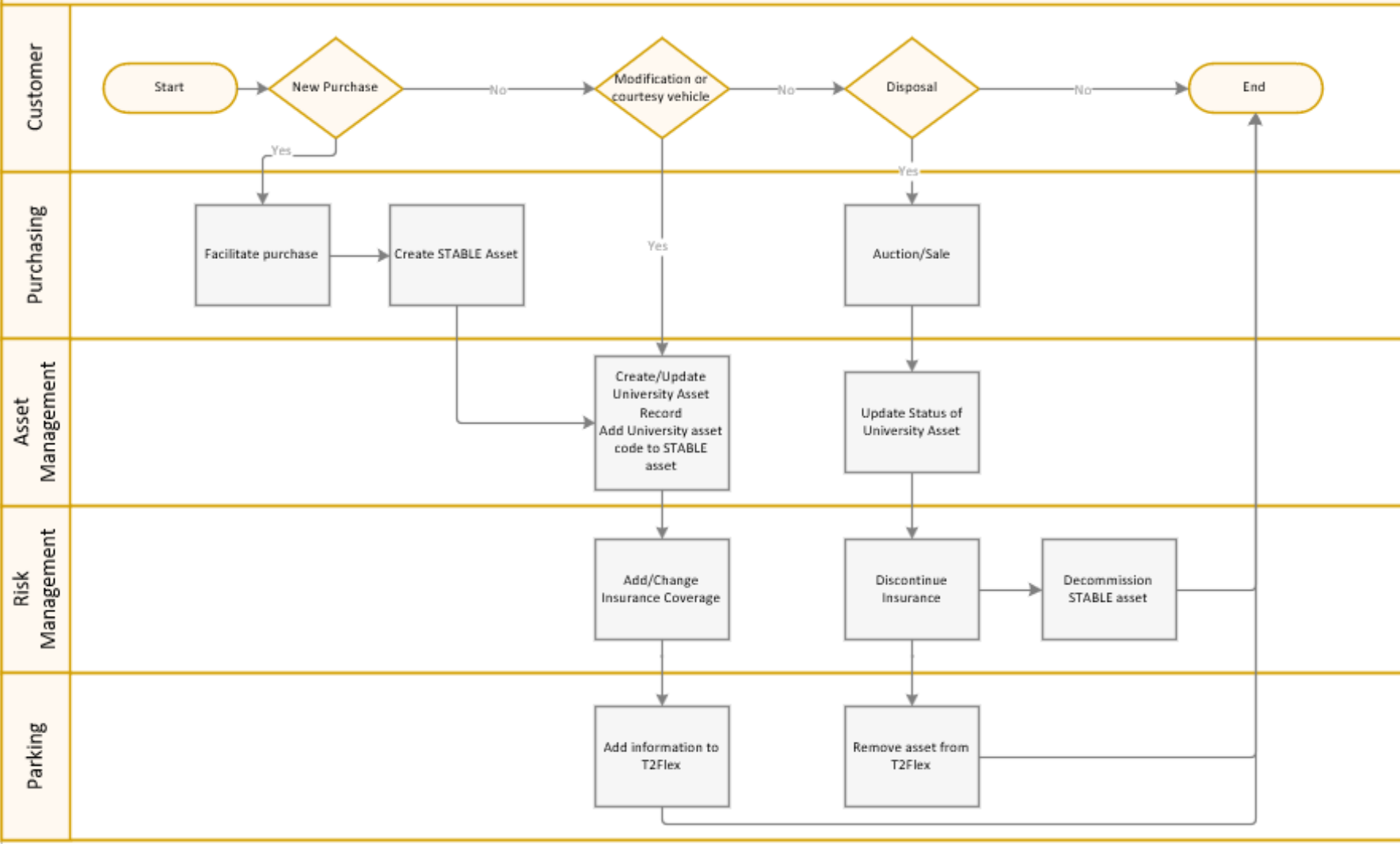
1. No technology can overcome bad process design
2. Leadership oversight and support is critical
3. Train, retrain, and repeat to form a new habit

# STABLE Facilities Ticketing Process



- Simplified overview of the ticketing process
- Green checkmark highlights key automated customer touch points
- Process involves multiple modules
  - Space
  - Tickets
  - Financial
  - Assets
  - Warehouse Management

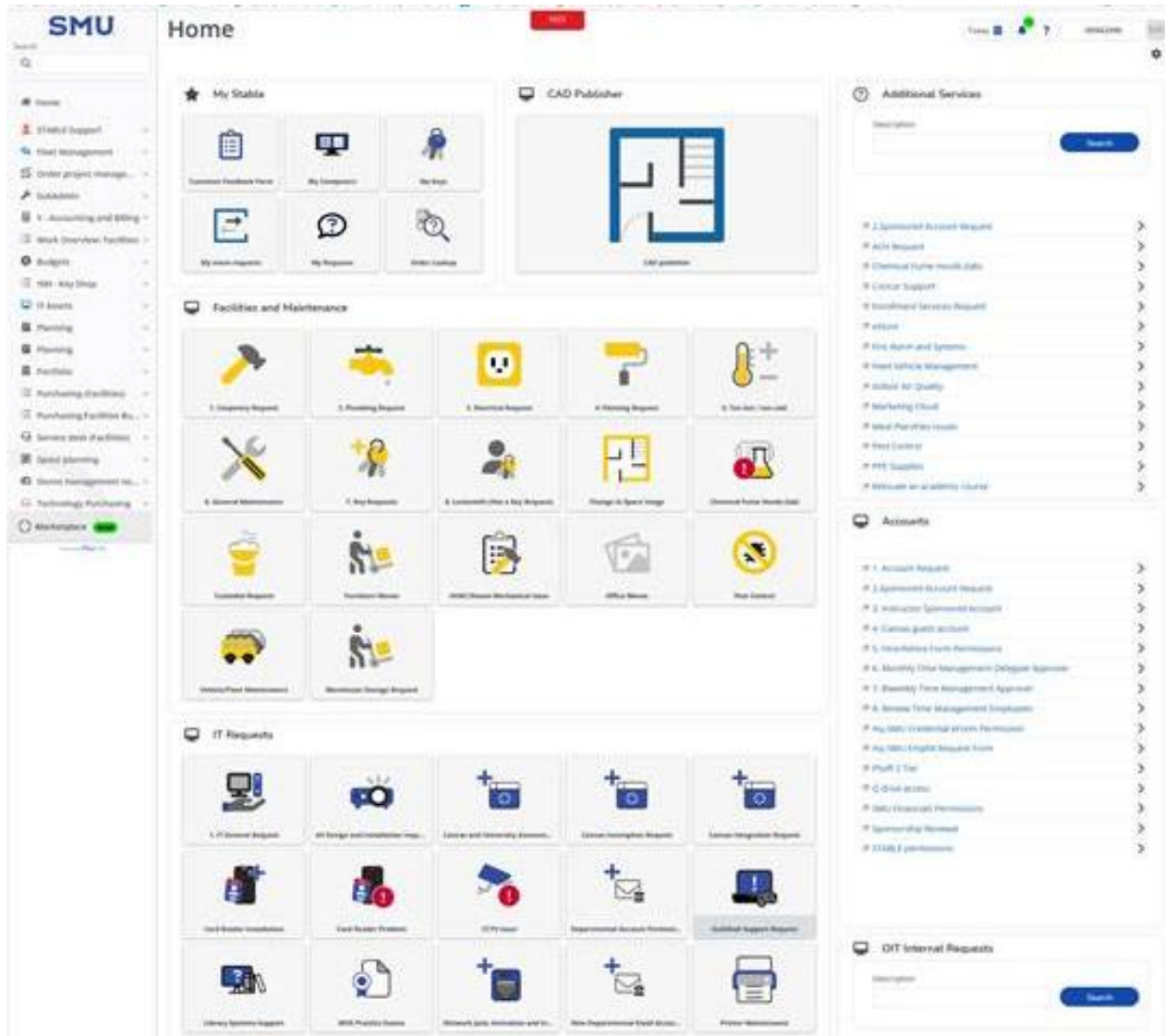
# Fleet Asset Management



- 1 Customer form
- Dynamic workflow routing to 4 departments
- Using ticketing and asset modules

1. Customer form will be available via STABLE home page for faculty and staff
2. Parent request will be monitored by Purchasing
3. Initial Asset record is created by Purchasing
4. Asset disposal in STABLE is facilitated by Risk Management
5. Maintenance and annual verification will be handled via report (not automated)

# The Customer Experience



## Creation

- Email (19 different email accounts will generate tickets)
- Webforms/portal
- Mobile App

## Update

- Email notifications
- Portal access

## Closure

- Notifications
- Feedback Survey

# Customer Form

## Plumbing Request

### Requestor details

Requestor

00942590 Rachel Mulry rmulry@mail.smu.edu

**Phone number**

(214) 768-1164

**Email**

rmulry@mail.smu.edu

**Manager**

46766651 Michael Hites hites@mail.smu.edu

**Department**

73.00000207, Customer Service

**Property**

120, Fondren Library Center

On Behalf of

### Location details

\* Property

\* Space

### Request details

\* Title

\* Request description

Submit

Cancel

# Customer Notification



Your SMU work order has been closed. Your feedback is important to us. If you'd like to comment on the service you received, please complete the [customer feedback form](#).

Requestor	
Requestor	Rachel Mulry
On behalf of	

Request Details	
Ticket Number	8061927.00
Request Reported On	06/24/2025
Request Description	Account Request Form
Resolution	Mirrored Groups Based on 03080349
Comment	



## My Requests

▼ Show more search options

1 - 98 of 98

Number	Description	Property	Reported on	Status	
8096816.00	Install appspace TV/onboard	Your Building, 001	6/30/2025 01:22 PM	Reported	>
8069640.00	Request for departmental technology purchase	Your Building, 001	6/25/2025 08:43 AM	In progress	>
8061927.00	Account Request Form	Your Building, 001	6/24/2025 12:42 PM	Request Complete	>
8018372.00	Power strips for training on 6/18	Hughes-Trigg Student Center, 555	6/17/2025 11:02 AM	Request Complete	>
8004763.00	no network connection	Fondren Library Center, 120	6/16/2025 07:23 AM	Request Complete	>
7945677.00	1. New Request	Fondren Library Center, 120	6/6/2025 11:11 AM	Request Complete	>
7939810.00	Furniture Moves	Fondren Library Center, 120	6/5/2025 02:16 PM	Request completed	>

Customer visibility to all of their requests

# The Result

(2025 data)

- **132,507** Classroom Reservations
- **94,282** Facilities Requests/Work Orders
- **86,594** Non Facilities Orders
- **61,069** Meeting room reservations
- **17,248** Spaces
- **20,445** Assets
- **5,172** Event Requests
- **207** Properties
- And more...

# A Wealth of Data...Numerous Questions

*How are my teams performing?*

*What are the utilization metrics from our various space types?*

*What are the trends among faculty? undergraduate students?...*



*Which buildings are seeing the highest number of repairs?*

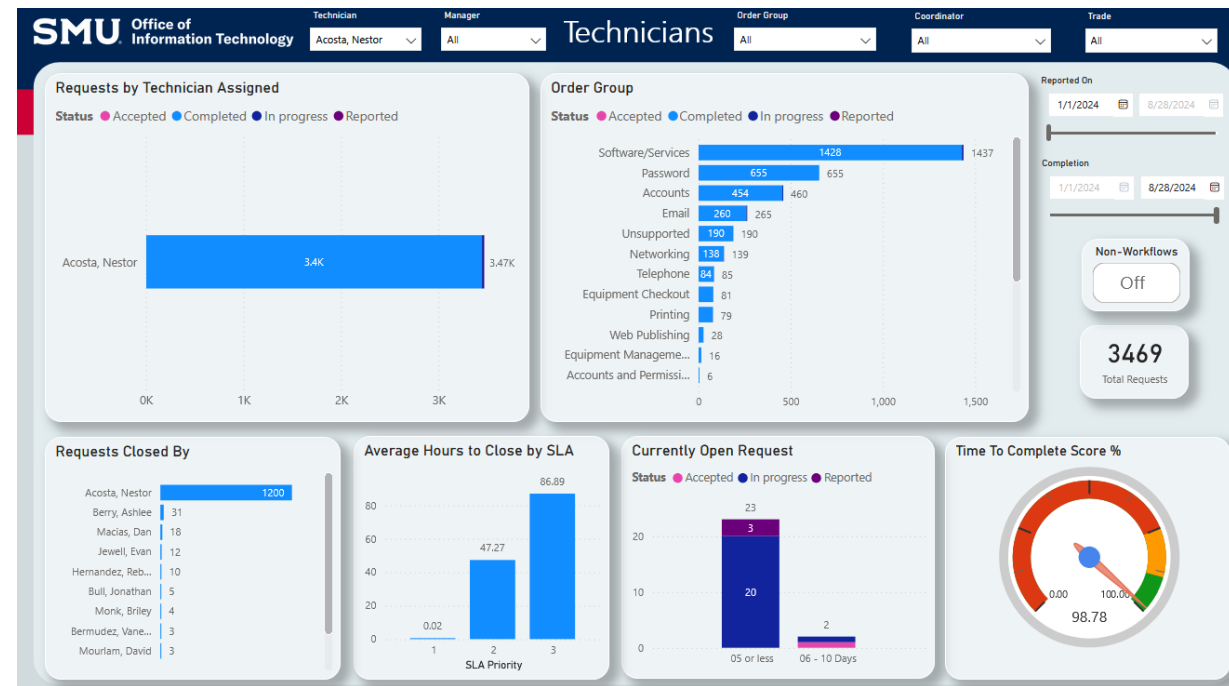
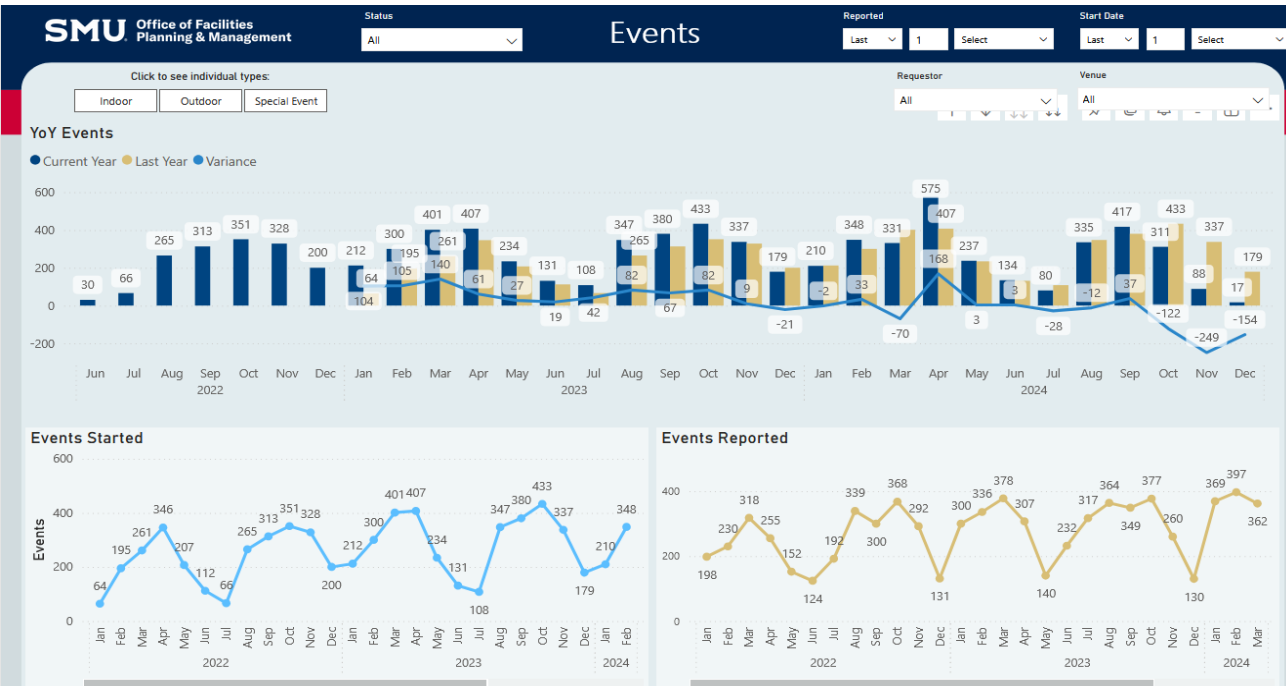
*Can we accommodate taking a building offline for repair for a semester?*

*How much space is allocated to active research?*

*What events are on campus today that may need awareness by Risk Management or SMU PD?*

*What are my expected costs for preventative maintenance?*

# Introducing PowerBI Dashboards



Type	Class Day	Available Spaces	Classroom																			
			8 AM	%	9 AM	%	10 AM	%	11 AM	%	12 PM	%	1 PM	%	2 PM	%	3 PM	%	4 PM	%	5 PM	%
Monday		154	39	25%	98	64%	116	75%	116	75%	89	58%	112	73%	96	62%	83	54%	46	30%	40	26%
Tuesday		154	44	29%	136	88%	139	90%	138	90%	139	90%	123	80%	133	86%	137	89%	94	61%	37	24%
Wednesday		154	35	23%	111	72%	134	87%	129	84%	90	58%	112	73%	105	68%	89	58%	47	31%	36	23%
Thursday		154	45	29%	135	88%	138	90%	137	89%	140	91%	126	82%	130	84%	131	85%	91	59%	30	19%
Friday		154	42	27%	105	68%	121	79%	117	76%	88	57%	105	68%	80	52%	55	36%	38	25%	25	16%
Saturday		154	19	12%	25	16%	27	18%	27	18%	24	16%	21	14%	20	13%	20	13%	17	11%	12	8%
Sunday		154	14	9%	14	9%	14	9%	14	9%	13	8%	13	8%	13	8%	13	8%	10	6%	6	4%

# Attempt 1: Dashboards that do it all...



- Initial excitement but poor utilization
- Led to review of the dashboard design and approach

# Design Pitfalls

Too much information in one dashboard

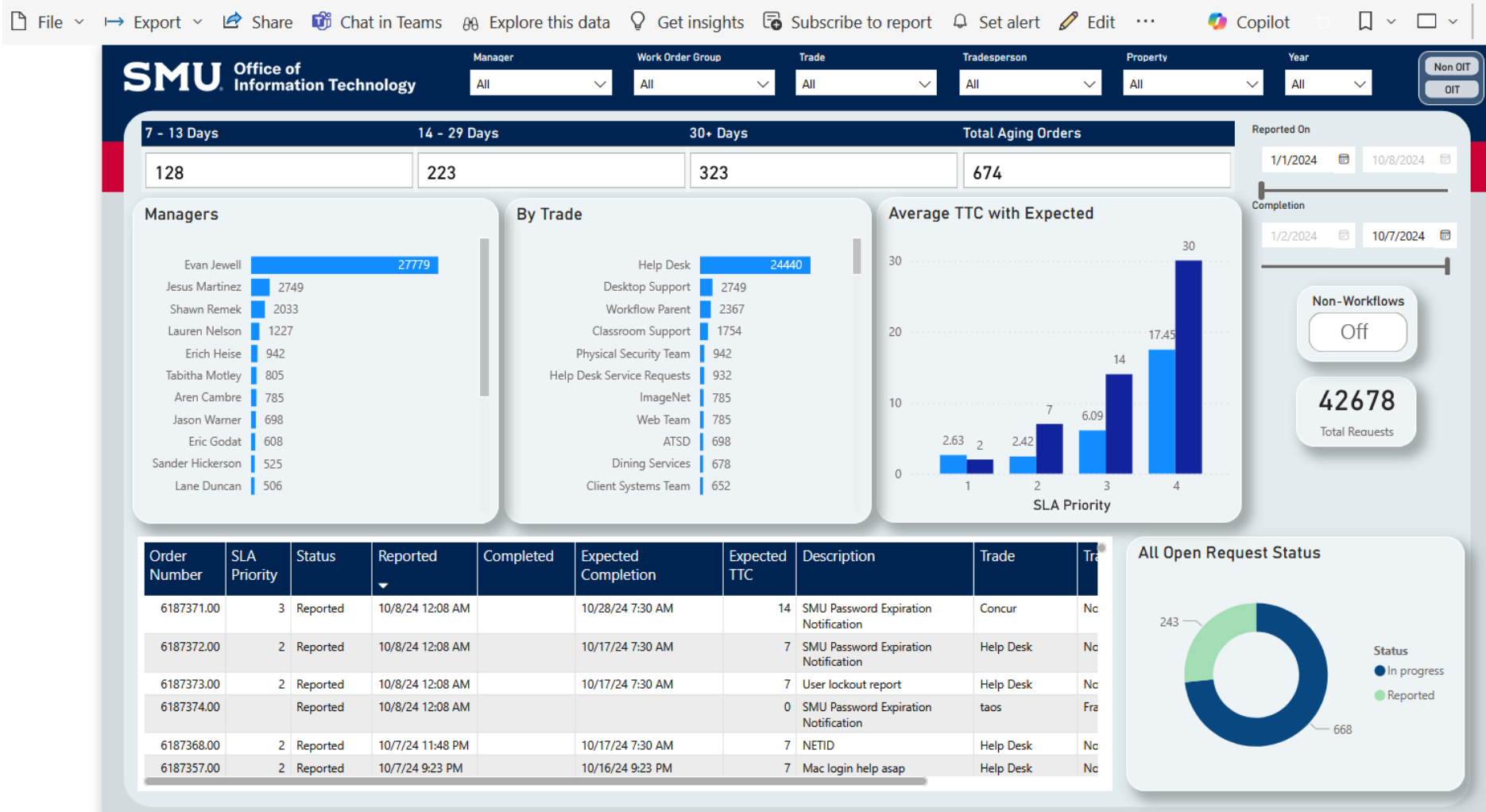
Complex and multi layered filters

Catering to multiple audiences in the same report

Overall aesthetics/flow

Incorrect visuals for the data

# Attempt 2: Dashboards with a single-purpose



**Providing Visibility to Aging Requests**

# Oversight and Continuous Improvement

## Strategic Oversight

- Yearly process review for Events and Reservations
  - Event policies
  - Alcohol policies
- Reservation centralization directive from President's Council
- Provost's Academic Space Committee established
  - Review requests for changes to space that may impact research, teaching, or student space
  - Collaborate on space sharing initiatives
  - Oversight into critical space changes in classrooms
- Conference room funding tied to STABLE
- Internal Audit review

## Operational Oversight

- Established cadence for upgrades and testing
- Monthly meetings between key stakeholder group in Facilities and IT to align development efforts
- Established process for development and release of PowerBI dashboards with review of data elements by appropriate module owner

# Space Management Coding Structure Overview

## SPACE MANAGEMENT CODING STRUCTURE

SMU

Office of Facilities Planning & Management

### ASSIGNMENTS



What person or PI Assignment?

Completion: 100%

#### DEFINITION:

Assignments consists of occupant assignments to a space. May also include Principal Investigator (PI) assignment to research labs or research-related rooms. Multiple occupants can be added to one office or lab.

#### ASSIGNMENT EXAMPLE:

SMU ID: 12345678

Surname: Peruna

First Name: Joe

Property: Expressway Tower

Space: 808A

Workspace: 808A\_WS001

### FICM CODE



What is the space?

Completion: 100%

#### DEFINITION:

Facilities Inventory and Classification Manual (FICM) is a coding system from the National Center for Education Statistics (NCES) that classifies the primary TYPE of room. Only one FICM code may be applied to a room.

#### FICM STRUCTURE EXAMPLE:

##### 01. Instructional Spaces

###### • 01.100 Classroom Facilities

- 01.100.10 Classroom
- 01.100.15 Classroom moveable seating flat floor

###### • 01.200 Laboratory Facilities

- 01.200.20 Class Lab General Laboratory
- 01.200.28 Research/Non-class Laboratory

###### • 01.300 Office Facilities

- 01.300.10 Office
- 01.300.13 Cubicle
- 01.300.70 Conference Room

###### • 01.400 Study Facilities

- 01.400.10 Study Room
- 01.400.20 Stack

### FUNCTION CODE



What type of activity?

Completion: 50%

#### DEFINITION:

Function Codes are based on a similar coding system from the THECB (Texas Higher Education Board) that identifies the ACTIVITIES being conducted in a room. Only one function code may be applied to a room.

#### FUNCTION STRUCTURE EXAMPLE:

##### 10 General Education

- 11 General Academic Instruction
- 12 Vocational/Technical Instruction

##### 20 Research Programs

- 21 Institutes & Research Centers
- 22 Individual or Project Research

##### 40 Academic Support

- 41 Library Services
- 42 Museums and Galleries
- 46 Academic Administration

##### 50 Student Services

- 54 Financial Aid Administration
- 55 Student Auxiliary Services

##### 60 Institutional Administration

- 62 Financial Mgmt. and Operations

### TRACKING CODE



What additional details to track?

Completion: 50%

#### DEFINITION:

Tracking Codes convey the more specific or additional operations occurring within the room, or an additional characteristic of the space that needs to be tracked for reporting or use.

#### TRACKING STRUCTURE EXAMPLE:

##### Dual Utilization

- DUAL\_PHYSICS (Utilized by Physics)

##### Lab Name

- LAB\_ARC (ARC Lab)

##### IACUC

- I ANML FAC (IACUC Animal Facility)
- I STL HSE (IACUC Satellite House)

##### Building Features

- \_ELEV (Elevator Freight)
- \_LACTATION (Lactation Room)

##### Emergency Management

- EMERGENCY\_GENERATOR (Emergency Generator)
- ELEVATOR\_LOAD\_LIMIT (Elevator Load Limit)

##### Real Estate Leases

- REL\_SMU\_OCC (SMU Occupied)
- REL\_LEASED\_OCC (Leased Tenant Occupied)

### ASSETS



What is within the space?

Completion: 30%

#### DEFINITION:

Assets encompasses physical assets residing within the room. The number of assets associated with a space is unlimited.

#### ASSETS EXAMPLE:

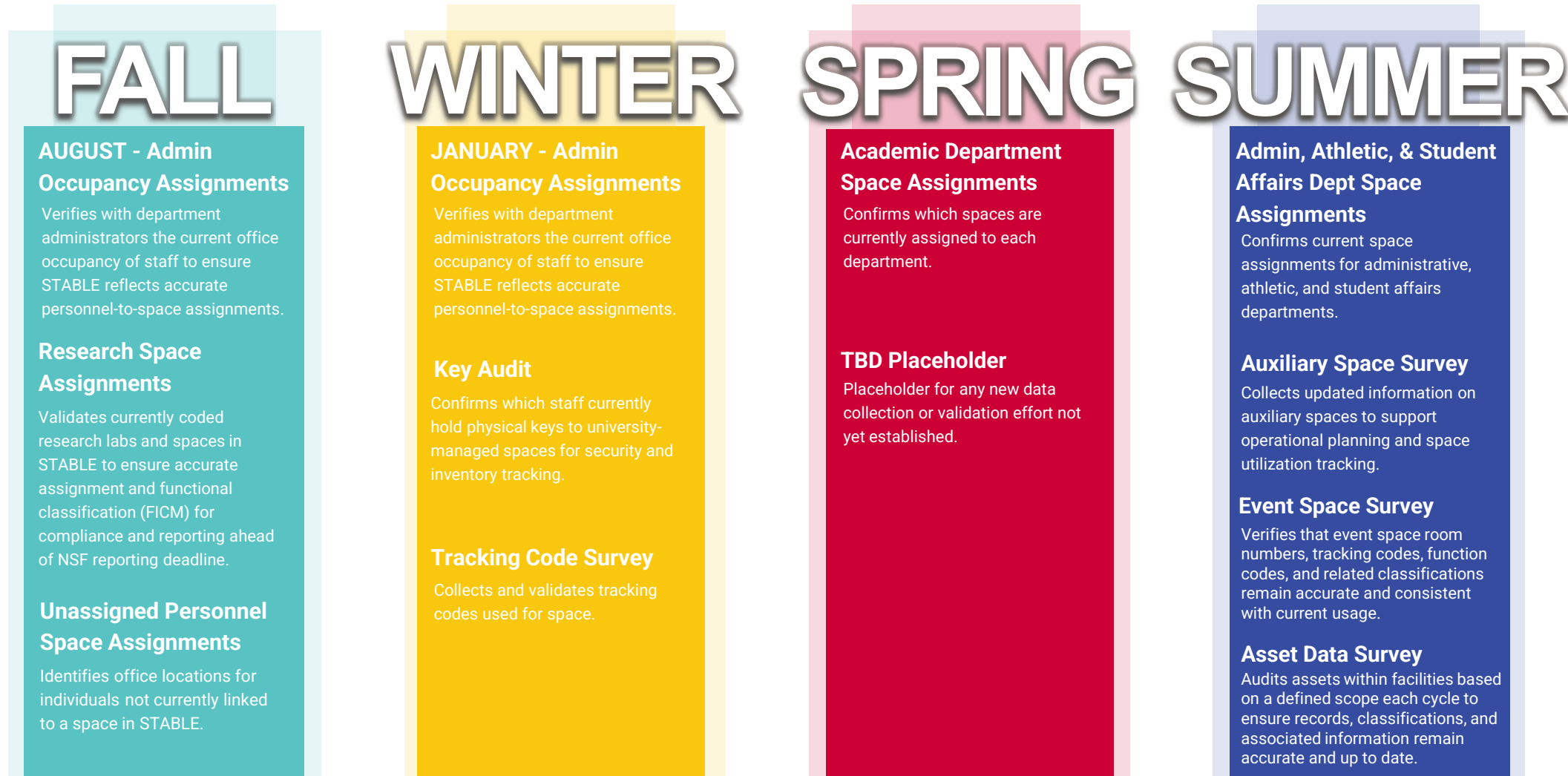
- 3D Printer
- Biosafety Cabinet
- Centrifuge
- Emergency Response Kit
- Environmental Monitoring System
- Eyewash/Shower
- Freezer
- High Powered Magnet
- Hood
- Incubator
- Laser
- Local Exhaust/Workstation
- Portable Monitor
- Powered Industrial Vehicle
- Refrigerator
- Sealed Source
- X-ray Device

Space Management

August 2025

SMU

# STABLE Audit Timeline



Please note: This timeline is subject to change as business needs and priorities shift.

# Integrations with other systems

HR – User load with attributes

Financials – Billing lines/Invoices

Student System – StarRez, Canvas enrollment

SQL Databases(User IT assets, CMDB)

Outlook and Scheduling panels – C4C/AMX, classroom reservations

PowerBI – Datalake/local DB

CCURE – Door access for reservations

LowCoder application – Asset survey

And more...

# Lowcoder Application: Capital Assets (Spring 2026)

• Please review each of the items below and update the validation field for each using the following:

- OK- the item is still in your care
- Modify/Delete: You are no longer are responsible for the item
- Add: If you are in possession of another capital asset and it does not appear on the list.
- Note: If the item should be deleted, you will need to submit the appropriate documentation using the new Capital Asset Modification form located at <https://smu-prod.planoncloud.com/case/BP/Asset>

③ User Assets

③ Manager Review

1

2

4

3

All Capital Assets are correct

Add New Capital Asset

Review Complete

Validation	Comment	Asset Code	Name	SerialNumber	Description	Model	AssetTag	Manufacturer	Location	Address1	Plant	
Click to select		000000004134	GIK Ethernet Switch	GIK EXTREME NET		Summit 400-48T	3426	Extreme Networks	CEEC220A	3150 BINKLEY AVE	EXTREME NETWORKS	0
Click to select		000000004135	GIK Ethernet Switch	GIK EXTREME NET		Summitt 400-48t	3424	Extreme Networks	CEEC220A	3150 BINKLEY AVE	EXTREME NETWORKS	0
Click to select		000000004136	GIK Ethernet Switch			Summitt 300-48t	3440	Extreme Networks	CEEC220A	3150 BINKLEY AVE	EXTREME NETWORKS	0
Click to select		000000004137	GIK Ethernet Switch			Summit 300-48t	3443	Extreme Networks	CEEC220A	3150 BINKLEY AVE	EXTREME NETWORKS	0
Click to select		000000004138	GIK Ethernet Switch			Summitt 300-48t	3429	Extreme Networks	CEEC220A	3150 BINKLEY AVE	EXTREME NETWORKS	0
Click to select		000000004139	GIK Ethernet Switch			6 Summit 200-24	3427	Extreme Network	CEEC220A	3150 BINKLEY AVE	EXTREME NETWORKS	0
Click to select		000000004657	PLASMA 65" DISPLAY	NG63470101		Plasma 65" Display	003303	PANASONIC	BLANT426	6185 AIRLINE	HI-ED	0

< 1 2 >

# Streamline Asset Verification (coming!)

- Asset inventory is not accurate or reliable
- Multiple disjointed efforts to verify
  - **Computers** (Qualtrics Survey)
  - **Capital Assets** (Email and spreadsheets)
  - **Office Assignments** (Departmental meetings, dashboards, and surveys)
  - **Vehicles/Golf Carts** (Email and spreadsheets)
  - **Cell Phones** (Email and spreadsheets)
  - **Keys**-no current verification process



# Summary



A centralized platform enables process transformation across the university and provides a wealth of data for decision making.



While achieving a single-entry point for customer requests is easy, building a consistent customer service experience requires accountability and buy-in from all areas.



Dashboards are only useful if individuals know how to ask the right questions and seek the answers in the data.



No tool is perfect for each task. Make sure the outcome delivers enough value to overcome shortcomings of the tool.



# Contact Us

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Rachel Mulry: [rmulry@smu.edu](mailto:rmulry@smu.edu)