## Asset Management Systems: Build it and they will come... Or will they?

#### Southeast Minnesota GIS User's Group Winter 2019 Meeting at Rochester Public Utilities



Kevin Morrissey, Kelsey Budahn, Christy Shostal City of Rochester, MN Department of Public Works

#### Overview

- History of Asset Management at RPW
- Selection Process for Work and Asset Management
- ElementsXS by Novotx, Inc.
- Multiple Components Working Together
- Demonstration
- Departmental/Field usage
- Challenges and Successes Next Steps
- Questions



#### History of Asset Management at RPW

- Paper Lists, Paper Forms
- Cartegraph Sign Maintenance
  - Pre 2000
  - Tabular only
  - 60% signs mapped by 2014
- AS/400
  - Sewer Maintenance
  - Crash Records
- ICON Pavement Mgmt
  - Street Maintenance
- Cues Granite XP Sewer CCTV
  - Not tied to GIS initially
  - VHS Tapes, paper books
- Map Books
  - Highlighters and markups

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#### History of Asset Management at RPW

- Scanned Paper Forms, More Excel,
- Word Documents (word-bases)
- And Folders...

2010 Work Folder			
2015 Projects List	BLACK ROCK STORAGE	5/18/2015 9:15 AM	
2015 Work Folder	BLONDELL'S PARKING LOT	1/17/2017 8:20 AM	
	B'NAI ISRAEL SYNAGOGUE	12/3/2010 3:08 PM	
2016 Project List	BOULDER RIDGE 3RD	10/7/2011 3:01 PM	
2016 Work Folder	BOULDER RIDGE 4TH	12/1/2010 3:51 PM	
2017 Work Folder	BOULDER RIDGE 5TH	4/27/2007 9:42 AM	
	BOULDERS APARTMENTS	1/17/2017 10:32 AM	
2018 Work Folder	BOWMAN DOOR SOLUTIONS	12/13/2017 4:12 PM	
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Reporting?		Sept 2018.xlsx	9/28/2018 6:44 AM



#### • Criteria:

- Web Applications
  - No Client Installs
- Any Device, Any OS
  - Users Determine Best Device
- GIS-Centric (Map First)
  - Common Operating Picture
- Single GIS Repository
  - no duplication of data
- Consolidate Silos
  - Retire Access DBs ASAP
  - Enterprise DB (SQL)

- Customizable Workflows  $\bullet$ 
  - Best Practice (or not!!)
  - Standardized processes are built • in
- Office And Field Editing
  - Where appropriate
- Unlimited Asset Types
  - Ability to grow as needs change
- Application Program Interface (API)
  - **Development for integration**
  - Future Proof?











- Research and Considerations:
  - Regional Survey of AMS
    - 50+ respondents
  - Survey of our own systems
    - Existing Systems First
  - Best Value Procurement
    - What we Think We Want
  - Resource Limited
    - Financial
    - Staffing
  - Administration and Council support 2013





# elements 🔊

#### UNMATCHED FLEXIBILITY.

Elements allows you to create your own workflow processes and tailor the user experience to the unique needs of your organization without custom code.

This means you're not restricted to how we believe you should do business; Elements XS3 is flexible enough to adapt to your unique business requirements via:

- Unlimited custom fields
- Unlimited custom record layouts
- Unlimited custom workflow processes
- Automated user-defined follow up events and triggers
- Data analysis and calculations on user-defined custom data schemas

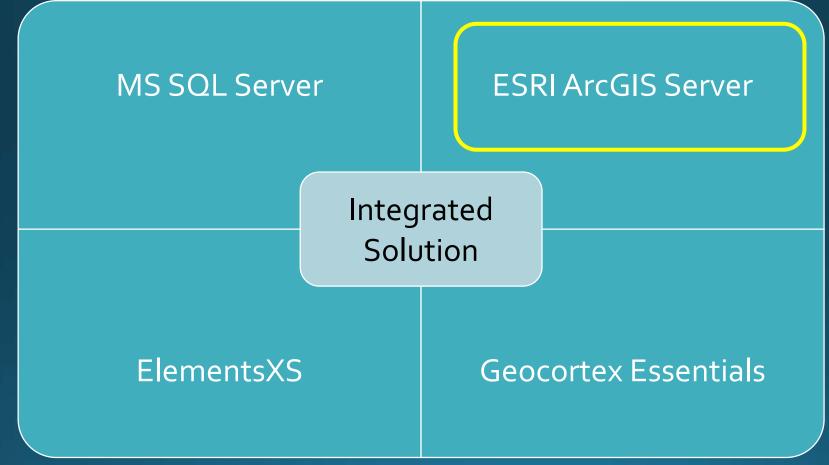
Each of the above is accomplished using Windows Workflow Foundation technology and our Dynamic Data management system, found only in Elements.

Don't worry, all custom data is stored nicely in SQL and can be easily queried for reports and spatial analysis.



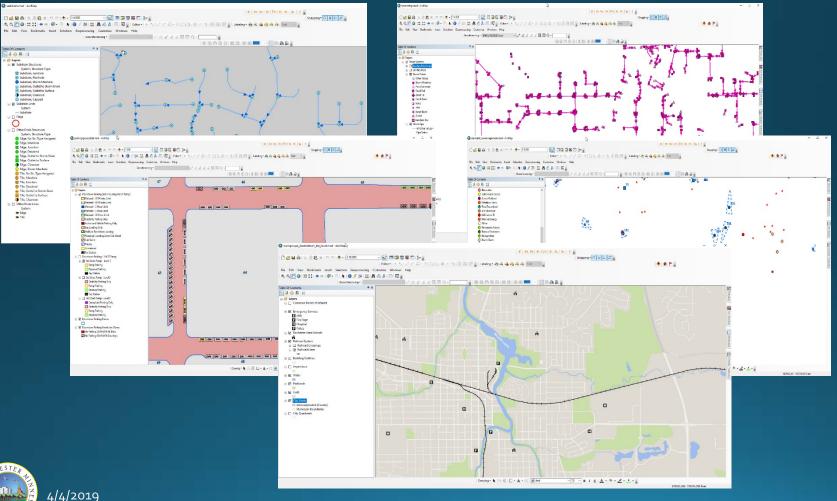








- Enterprise Geodatabase ullet
  - Preparing The Data to Publish Web Services  $\bullet$

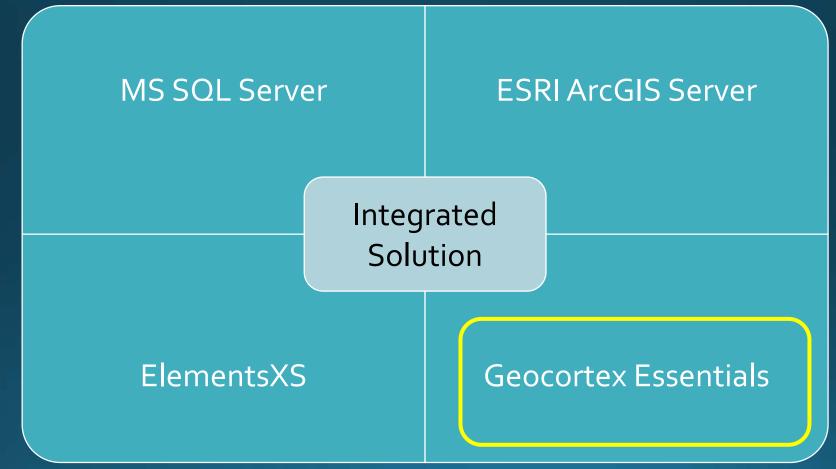


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- Enterprise Geodatabase
  - Preparing The Data to Publish Web Services

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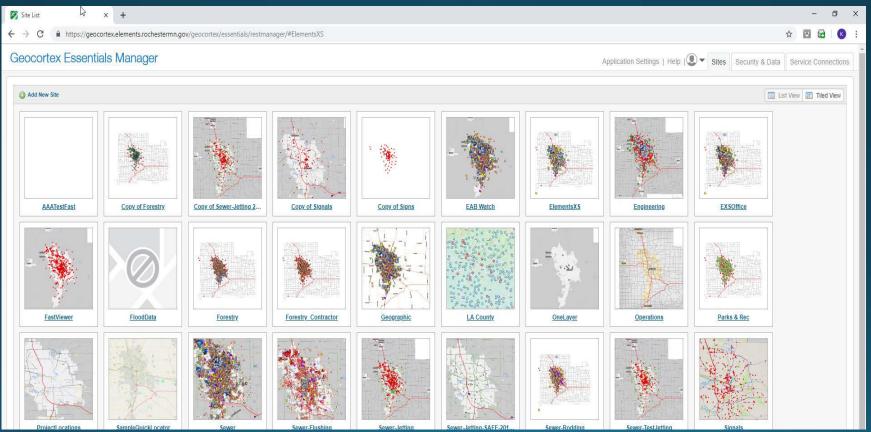






#### • Geocortex Essentials

- Building "Sites" and "Viewers"
  - Similar to AGOL "Maps" and "Apps"





- Geocortex Essentials
  - Building "Sites" and "Viewers"

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#### • Geocortex Essentials

• Building "Sites" and "Viewers"

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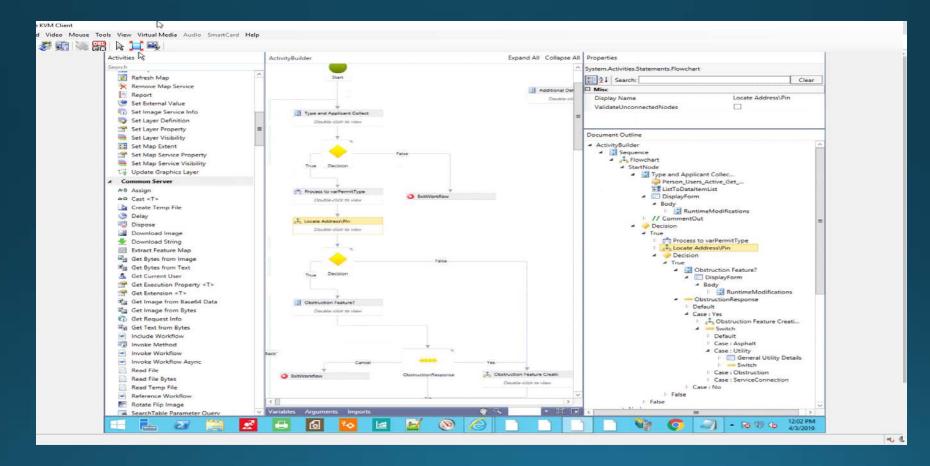
#### • Geocortex Essentials

• Building "Sites" and "Viewers"

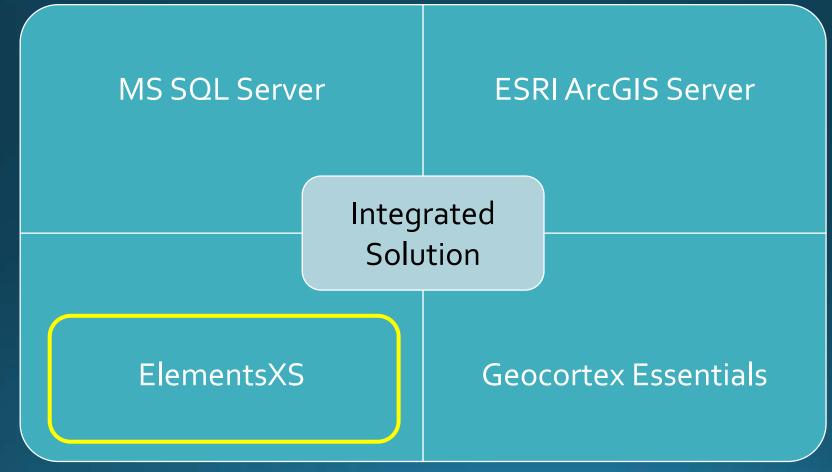
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- Geocortex Essentials
  - Workflow Designer









4/4/2019

- ElementsXS Configuration
  - Admin Tools

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- ElementsXS Configuration
  - Admin Tools Map Layers

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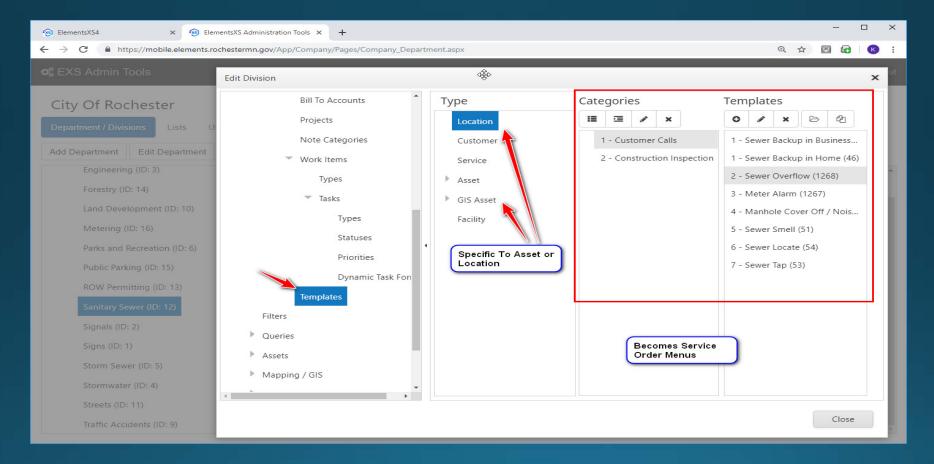


- ElementsXS Configuration
  - Admin Tools Service Order Task Types

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- ElementsXS Configuration
  - Admin Tools Templates (Setup)





- ElementsXS Configuration
  - Admin Tools Templates (User Interface)

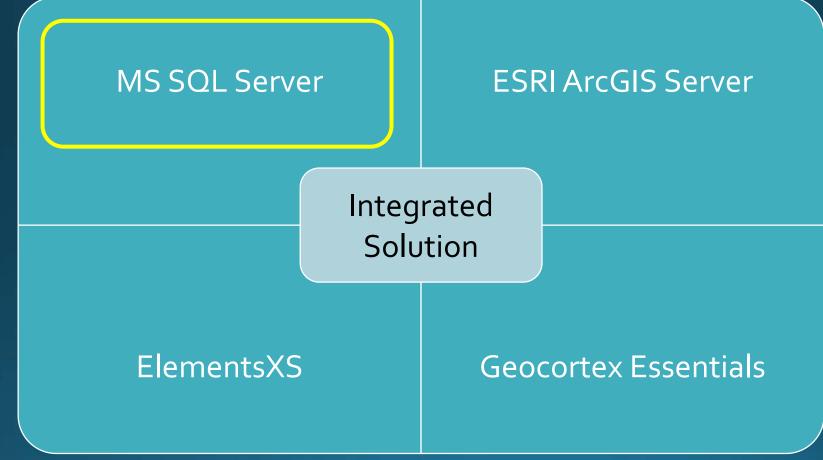
😒 Eleme	entsXS - Geocortex Viewer 🗙 🐵 Eleme	ntsXS4 ×	ElementsXS Administration Tools	; ×   +			- 🗆 ×
$\leftarrow \rightarrow$	C https://elements.rochesterm	n.gov/App/LandManageme	ent/Locations/Locations_Details.as	px?id=13199&dep=1			☆ 🖾 🖬 🛛 😢 🗄
E	elements®						🔎 O Q ? 🍐
	Location 1600 7 AVE NE ROC	HESTER, MN 55906					ා VIEW ON MAP
C La	ocation No.: 13199		Customers				
<b>오</b> Pr	rimary Address: 1600 7 AVE NE ROCHESTER, MN 55906		MORRISSEY, ALEXANDE Primary	RA K (36722) 🔎			
	arcel No.: 002995		MORRISSEY, KEVIN M (	25294) 🔎			
St	tatus: Active		Primary 🤰				
<u>~</u> 15	ype: Parent						
الله جر کار	HISTORY ATTACHMENTS Show All History	EXTERNAL LINKS		Templates Supply Flyout Service	all 🎦 Note	🔀 Email	
<b>#</b>	Item	Engineering  Forestry Parks and Recreation	Туре	Order Menus	Division	Status	Created By
-	Tree Inspection (Standard) (Te	ROW Permitting	Service Order Task	03/30/2019 09:45:23	Forestry	Completed	Kevin Morrissey
	tree needs to come dow	Sanitary Sewer 🕨 🕨	1 - Customer Calls	1 - Sewer Backup in Business	ution or notes let's be	consistent	
		Signs 🕨	2 - Construction Inspection 🕨	1 - Sewer Backup in Home	autori of notes leto be	consistent	
	FORESTRY -00037562 (Routin	Stormwater  Streets	Service Order	2 - Sewer Overflow 3 - Meter Alarm	Forestry	Complete	Kevin Morrissey
	Illegal Dumping (Task ID: 2195	83)	Service Order Task	4 - Manhole Cover Off / Noisy	Stormwater	Completed	Kevin Morrissey
	test - and Closed!			5 - Sewer Smell 6 - Sewer Locate 7 - Sewer Tap			



- ElementsXS Configuration
  - Admin Tools GIS Asset (User Interface)

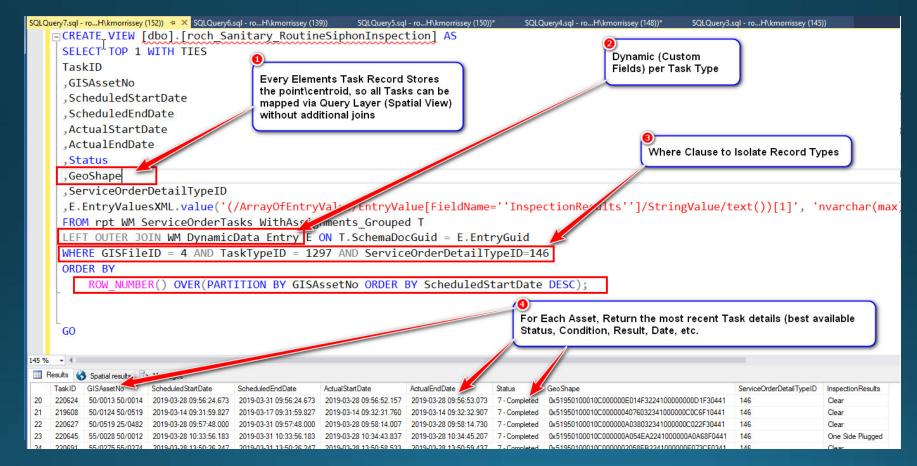
🔊 El	lementsXS - Geocortex Viewer 🛛 🗙 🛛 😣 ElementsXS - Geocortex Map Vie 🗙	🐵 ElementsXS4	× 😰 ElementsXS Adn	ninistration Tools × $ $ +		- 🗆 ×
← -	C https://elements.rochestermn.gov/App/Assets/GISAsset	s/GISAssets_Details.aspx	entsXS4 %2050/0076&lid=4			☆ 🖾 📑 💌 :
=	elements®		Reading From G		<b>#</b>	<b>▲</b> 22 ♀ ♀ ▲
*	GIS Asset Pipe ID : 25/0469 50/0076		HTML Format configurable			😚 View On Map
۲	Pipe ID : 25/0469 50/0076 Length: 433.4				Reading From AM	лs
<b>Ŷ</b>	Material: RCP					-
	HISTORY ATTACHMENTS EXTERNAL LINKS					
<u>~</u>	Show Service Order Tasks I 💌 🎇 Service Order 💌	Documents 🝷	Activity	Phone Call	Note 👸 Ema	ail
	Item	Туре	Date	↓ Division	Status	Created By
عر مد	Jet Cleaning (Siphon) (Task ID: 220621)	Service Order Task	03/28/2019 09:54:21	Sanitary Sewer	7 - Completed	Kevin Nelson
*** ***	Inspection (Monthly) (Task ID: 220620)	Service Order Task	03/28/2019 09:53:36	Sanitary Sewer	7 - Completed	Kevin Nelson
	Inspection (Monthly) (Task ID: 219605)	Service Order Task	03/14/2019 09:29:06	Sanitary Sewer	7 - Completed	Derek Ohm
æ	Inspection (Monthly) (Task ID: 218317)	Service Order Task	01/31/2019 03:02:41	Sanitary Sewer	7 - Completed	Derek Ohm
	Inspection (Monthly) (Task ID: 213404)	Service Order Task	12/21/2018 08:10:04	Sanitary Sewer	7 - Completed	Kevin Nelson
	Inspection (Monthly) (Task ID: 208364)	Service Order Task	11/30/2018 08:05:39	Sanitary Sewer	7 - Completed	Derek Ohm
	Inspection (Monthly) (Task ID: 203900)	Service Order Task	10/31/2018 02:52:19	Sanitary Sewer	7 - Completed	System Administrator





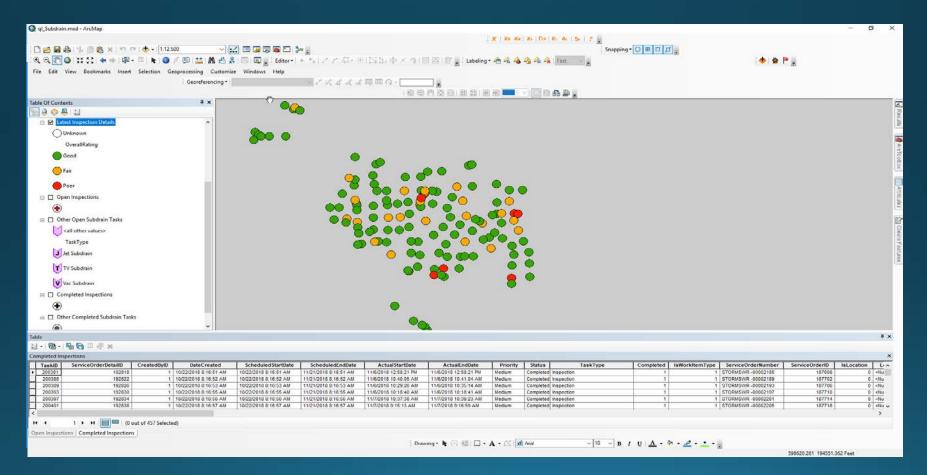


- Publishing AMS Specific Map Services
  - Query Layers "Open Tasks"



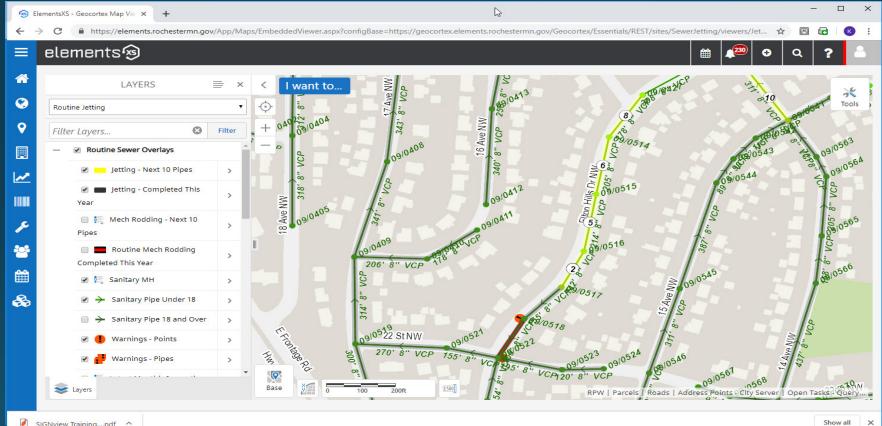


- Publishing AMS Specific Map Services
  - Query Layers "Open Tasks"

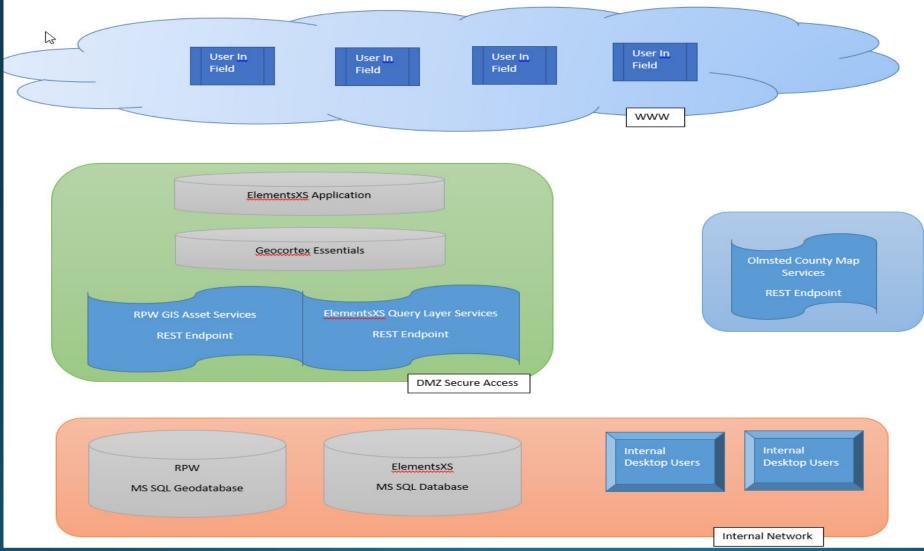




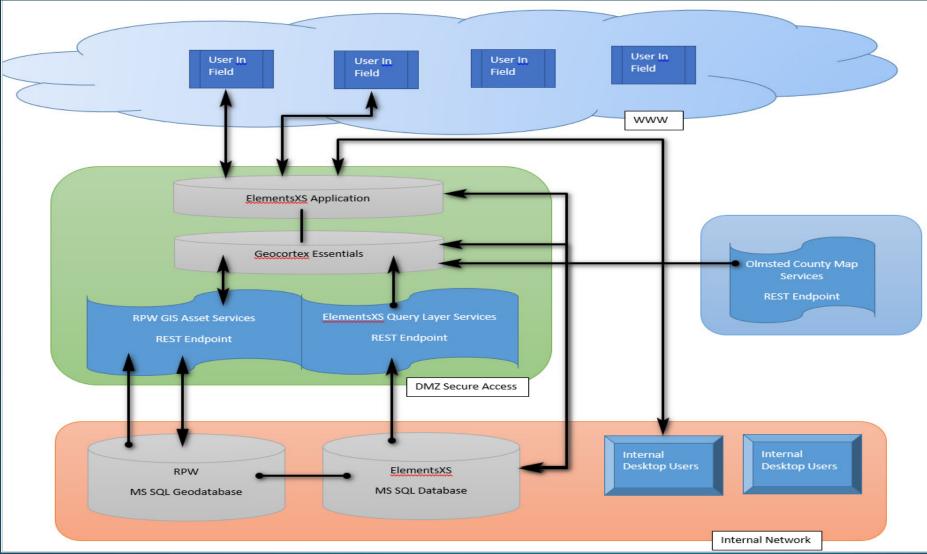
- Publishing AMS Specific Map Services ullet
  - End User Map View ullet



4/4/2019









#### Departments and Usage

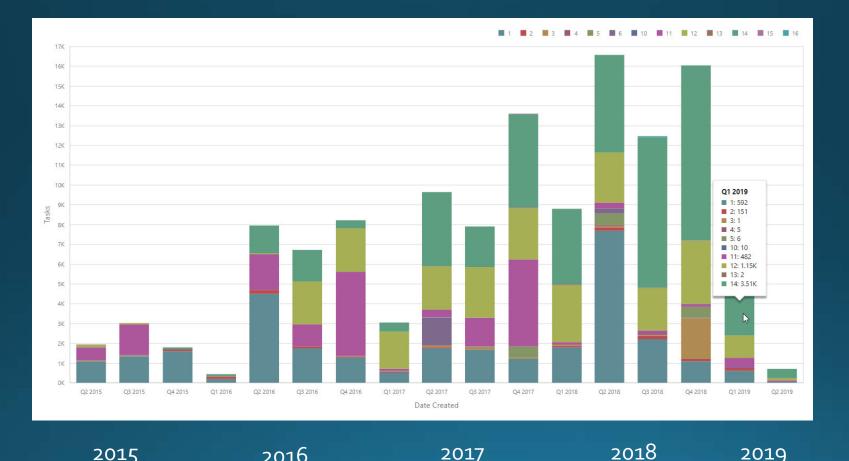
- Departments
  - Public Works
  - Parks and Forestry
- Full Adoption
  - Forestry Call Logging, Inspection, Maintenance, EAB, Enforcement
  - Sanitary Sewer Routine Maintenance, Inspections
  - Traffic Signals Maintenance Calls
  - Crash Records Historical Analysis
  - Signs All Inventory and Maintenance
  - Street Maintenance All Calls, Work Dispatch
- Dipping their toes
  - Storm Water Complaint Tracking
  - Infrastructure Sidewalk Inspections
  - Engineering Project Tracking and Acceptance Inspections
  - Parks Complaint Tracking
- Testing \ Development
  - Pavement Management Annual Maintenance Planning
  - Right of Way Permitting
  - Gopher Locates
  - Public Service Announcements



#### **Departments and Usage**

2016

• Over time, more processes are transitioned into Elements



2017

4/4/2019

2015

2019

#### Overview

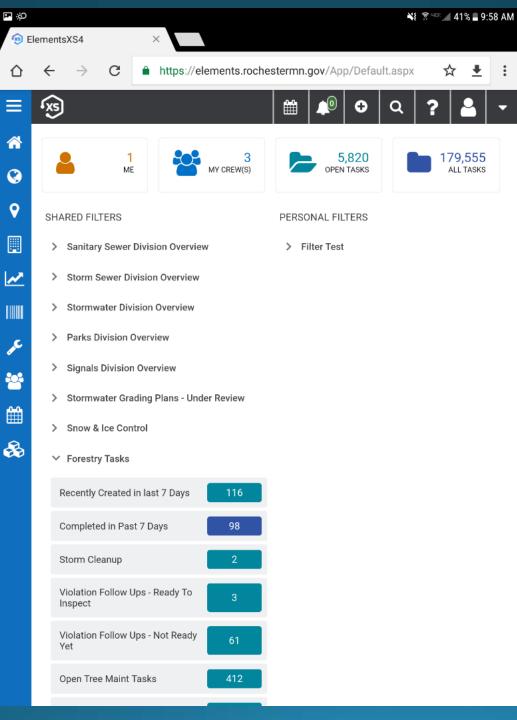
- History of Asset Management at RPW
- Selection Process for Work and Asset Management
- ElementsXS by Novotx, Inc.
- Multiple Components Working Together
- Demonstration
- Departmental/Field usage
- Challenges and Successes
- Next Steps
- Questions



#### Demo

Home screen:

- Task assignments
- Set filters





#### Demo

All Open Tasks:

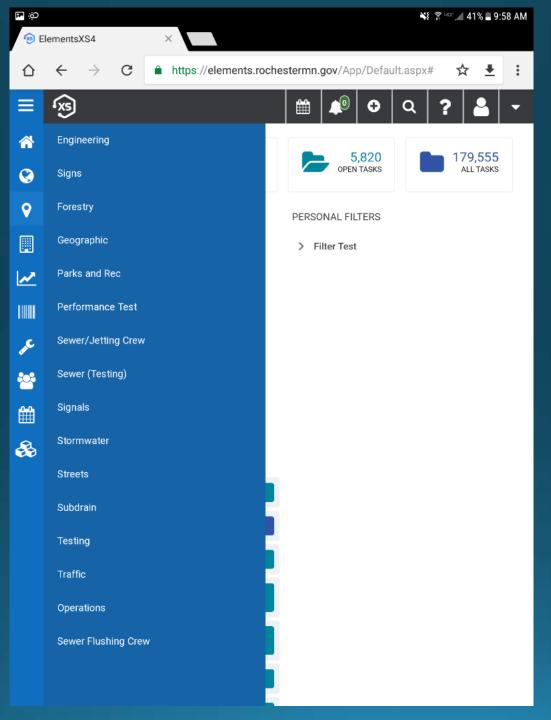
- Filter by list •
- Query and • sort

پې 🖪 🕞	lementsXS	54	×		🔌 🔋 чाः 📶 34% 🛢 11:07 A	АM
☆	÷	→ C	https://elem	nents.rochestermn.go	v/App/WorkManagemer 🕁 👤	:
≡	ſxs				🔊 🖸 🍳 ? 🚨 🚽	
*	Forest	try   Filter App	lied: Violation F	Follow Ups - Not Ready	v Yet (All Open Tasks)	
<b>(</b> )	2	× <b>T</b>	7	₽ <sup>₽</sup>	🖬 🚳 🖁 🖃 生 Expor	't to
<ul><li>♥</li></ul>		Service Order	Task Number	Task Type T	Location Address	GI
2		FORESTRY -00023987	Task #: 157127	Violation Follow Up - High Risk	160 INTERLACHEN LN NW ROCHESTER	
		FORESTRY -00034479	Task #: 213770	Violation Follow Up - Diseased Tree	1500 HWY 52 N ROCHESTER	
**		FORESTRY -00032665	Task #: 209926	Violation Follow Up - Diseased Tree	2783 SHERBURN LN SW ROCHESTER	
<u>الل</u>		FORESTRY -00031928	Task #: 208662	Violation Follow Up - Diseased Tree	704 SOUTHTOWN HEIGHTS CT SW ROCHESTER	
*		FORESTRY -00034325	Task #: 213271	Violation Follow Up - Diseased Tree	412 24 ST SW ROCHESTER	
		FORESTRY -00032209	Task #: 209132	Violation Follow Up - Diseased Tree	25 WOOD LAKE DR SE ROCHESTER	
		FORESTRY -00034487	Task #: 213800	Violation Follow Up - Diseased Tree		P# 01 {A {9 {9 {P
	Pag	e 1 of 2 (61 item:	s) < 1	2 >	Page size:	Pa 50



#### Demo

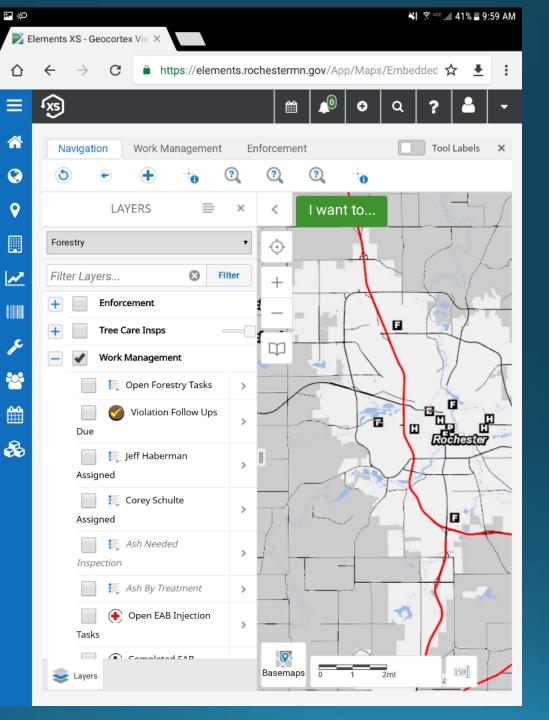
- Map Viewers:
- Department, division, or task specific





#### Map Viewer:

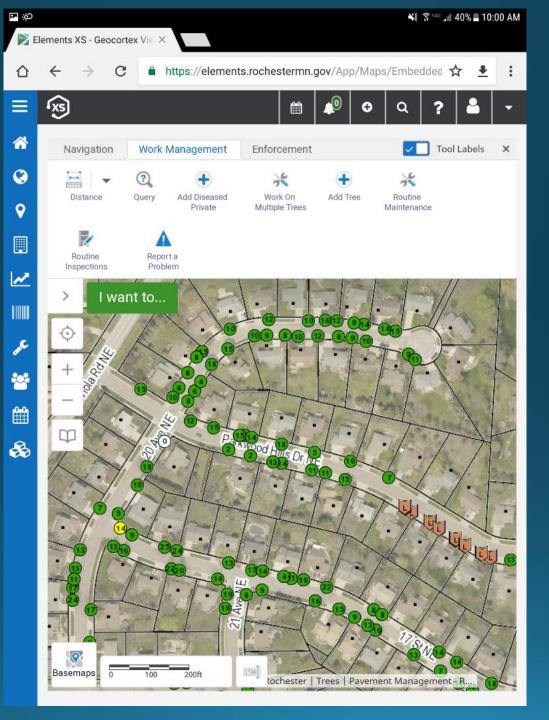
- Layers Panel
- Toolbars
- Map View





Map Viewer:

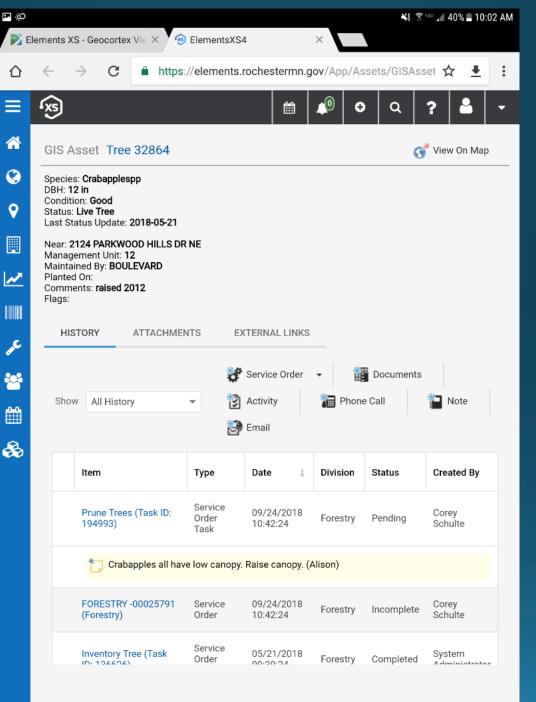
• Work Mgmt tools





#### GIS Asset:

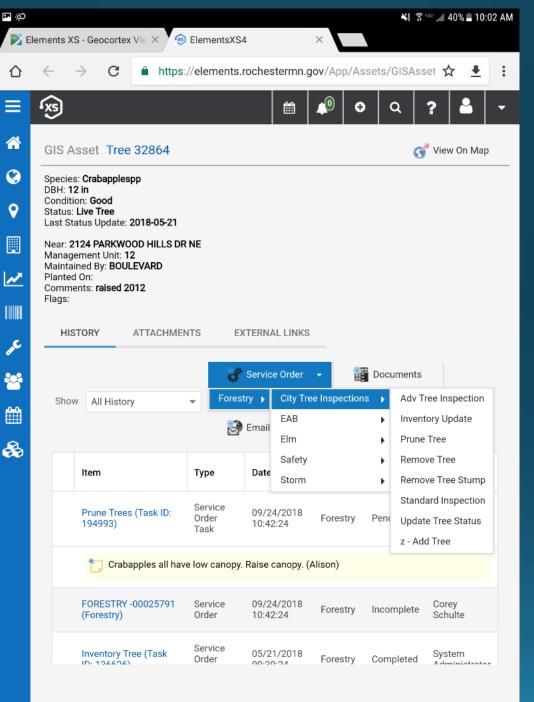
- Key attributes
- Service order history
- Create new service orders





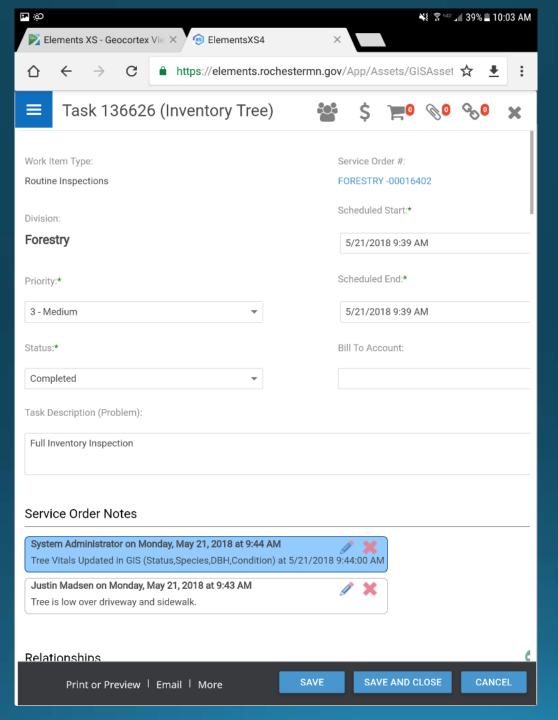
#### Service Order:

 Choose from a custom pick list



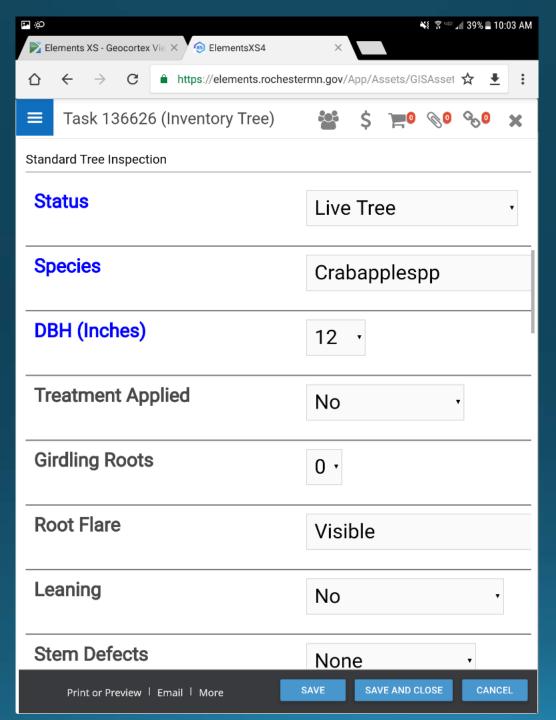
#### Service Order:

- Service order #
- Task #
- Task Type



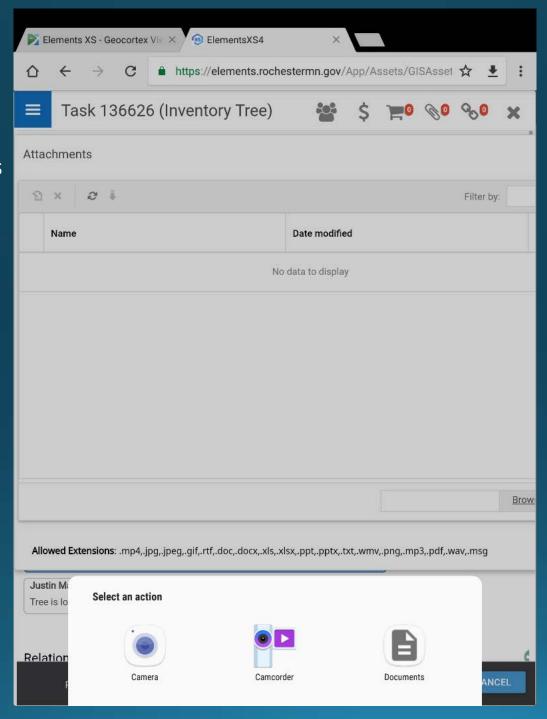
#### Service Order:

- Task #
- Task Type
- Enter main attributes + more



#### Service Order:

 Attach items to task





### Elements Reports

ements	Report	.S	rvice	Order	Tasks	Created Year 1	To Date	Bv Siana	al		
			ion: Sign						Completed:	32 _	Fotal: 33
			Signal: S	Signal 0200	at CSAH :	22 (37th St NE/E Cir Dr NE	And TH 63		Completed:		Fotal: 1
			Broadwa Created \$	ay) Signal ID	Task #	Task Type	Status	Problem		Resolut	ion
		01/23	/2019 (	0200	218023	Luminaire Not Working	Pending	Cover fell off of in NE corner.	luminaire		
				Signal 0210 Signal ID	at Rocky Task #	Creek Dr NE And TH 63 (N Task Type	V Broadway) Status	Problem	Completed:	1 1 Resolut	Fotal: 1 ion
			3/2019 (	-	214252	Pedestrian Countdown	Completed	Turn ped signal they are pointed the opposite lar	I heads so I d directly at i nding. I the buttons, I urned so ( own (	Moved p in the N N. Broad N. Broad Creek, S Creek.M	bedestrian countdown W corner for crossing dway, NE corner for dway and Rocky SE corner for Rocky loved 5 section head orner for SB traffic.
						rn Heights Dr NE And TH			Completed:		Fotal: 1
				Signal ID	Task #	Task Type	Status	Problem		Resolut	ion
	All Ta		2/2019 (	0220	213928	Vehicle Detection	Completed	Had a complair intersection wa running correct phases 2 and 6 fault. Detection have been cut of construction.	s not ly.Found where in wire must		
				Signal 0300 Signal ID	at Center Task #	St And TH 63 (Broadway) Task Type	Status	Problem	Completed:	4 1 Resolut	Fotal: 4
					Task #	таѕк туре	Status	Problem		Resolut	
	le.	Mond	oay, Februa	ary 25, 2019							Page 1 of 8
Updase f	State Factor Contractor protocol	Port for start of the start of	Chip sea	Tal Cres I weets inspe	send to all confer	cheed carbon balling raine reported					
		Tasks by Assignments									
		sk lasks by Assignments K Assignmen		.							



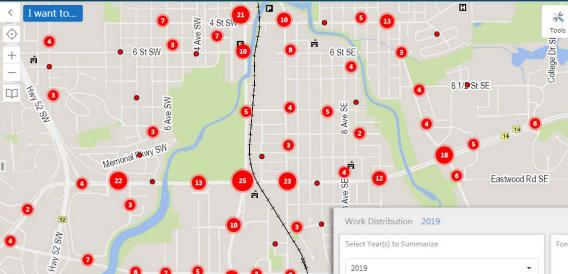
Tasks by Type

25K 20K 15K 15K 10K 5K 0K

Tasks by Status 88k per of Xee 40K 20K

### Elements Reports

1500



Ave SE

2019		•			
Pivot 1					
	▶ 2019	Grand Total			
City Tree Inspection Requests	6	6			
City Tree Maintenance Tasks	16	16			
City Wide Check	1	1			
EAB Efforts	1.57K	1.57K			
Encroachment	31	31			
Private Property Inspection Requests	473	473			
Routine Inspections	778	778			



	City Tree Inspection Requests	City Tree Maintenance Tasks	City Wide Check	EAB Efforts	Encroachment	Private Property Inspection Requests	Routine Inspections
January	3	8		1.57K	14	344	287
February				1	1	77	200
March	3	6	1	1	15	46	168
Grand Total	6	14	1	1.57K	30	467	655

4/4/2019

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Basemaps

× 5

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#### Overview

- History of Asset Management at RPW
- Selection Process for Work and Asset Management
- ElementsXS by Novotx, Inc.
- Multiple Components Working Together
- Demonstration
- Departmental/Field usage
- Challenges and Successes
- Next Steps
- Questions



# Challenges (Technical)

- No mobile device management policies in place (technical needs ahead of our policies).
  - Managing each device naming convention, inventory control, OS updates.
- Initial restrictions by IT: had to use Microsoft devices, no Android or iOS
  - A lot of time and \$ spent trying to get Elements to work smoothly on Dell Venue and Microsoft Surface devices.
  - Eliminated users from being able to use phones.
  - Moving to DMZ finally allowed for the use of any device type.
- Connectivity in the field varies.
- Battery depletion by end of full day.
  - Charge during breaks with car chargers.
- Winter devices difficult to use when cold.
  - Use a stylus to keep fingers functional.



- Misconception that Elements would do everything (including microwave your cup of coffee).
  - Hard for some to understand what the system should and should not be used for.
  - Not a "one size fits all" and some work flows are best suited for other systems.
  - Why recreate the wheel is systems already exist that are transparent, efficient, and cost-effective?
    - Disaster Management, Stormwater/MS<sub>4</sub> Activity Tracking.
- Challenges with culture/behavior
  - Not going to give up my clip board
  - The drop down says "pink" but I prefer "rose"
  - Disconnect between some groups in the field and those in the office using the data and realizing the gains.
  - Preference for older/existing systems due to comfort.
  - Reluctance by many to provide critical/essential feedback.



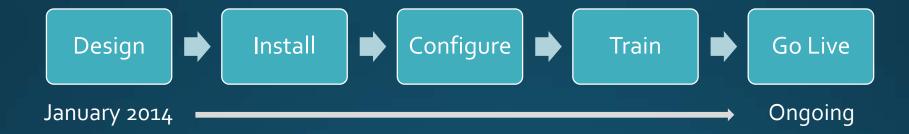


- Funded and approved as a project and not a program.
- Project team turnover without replacing roles.
  - No acknowledgment that the scope, cost and/or timeline needed to adjust.





• Adjust timeline and scope to match resources.





- Lack of a strong champion within the Department.
- Turnover in the Organization resulted in initial champion leaving.
- Major organizational changes have resulted in many diverging areas of focus.
  - Need focus.
  - Need support and resources.
  - Vision/capabilities need to be understood.
  - Need buy-in.
  - Need help buffering requests.



### Successes

- Biggest success with groups with no existing systems in place (i.e. Forestry)
  - Able to start from scratch, no comparisons to past systems/tools, openminded and enthusiastic partners.
- Consistent, replicable, reportable information
  - Can perform analysis (i.e. subdrain inspection data, crashes, etc.).
  - Can pass data onto consultants (or other entities).
  - Contractors able to access (i.e. Rochester Plumbing & Heating).

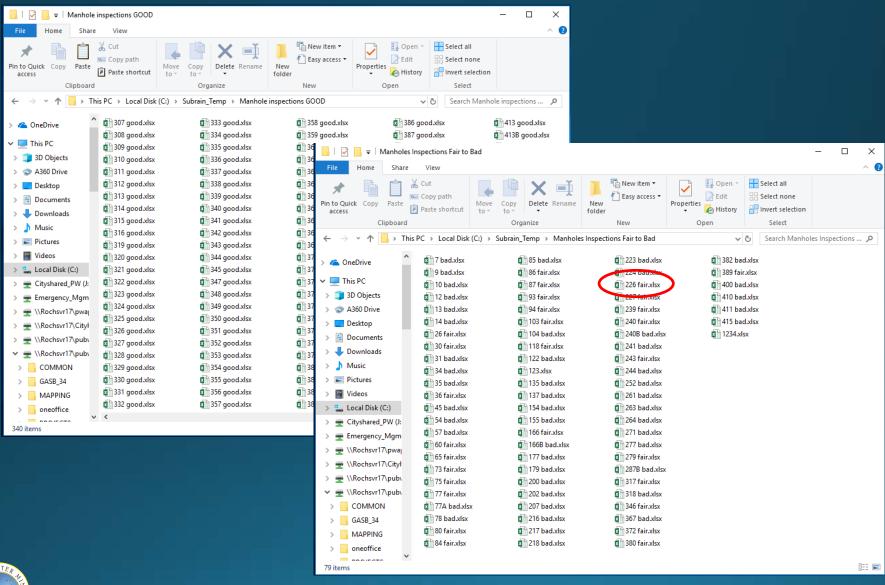
SUB-DRA		ANHO	LE INS	PECTI	ONS				
Date					1	1/28/2016			
Manhole #						226	)		
Street Location	927 21 st se								
Size of Lines	6"								
Condition of Invert	None			1					
Flow	Good								
Comments and Diagram	Debris ir	n MH							
Insert Picture									

Sample "pre-Elements subdrain inspection report



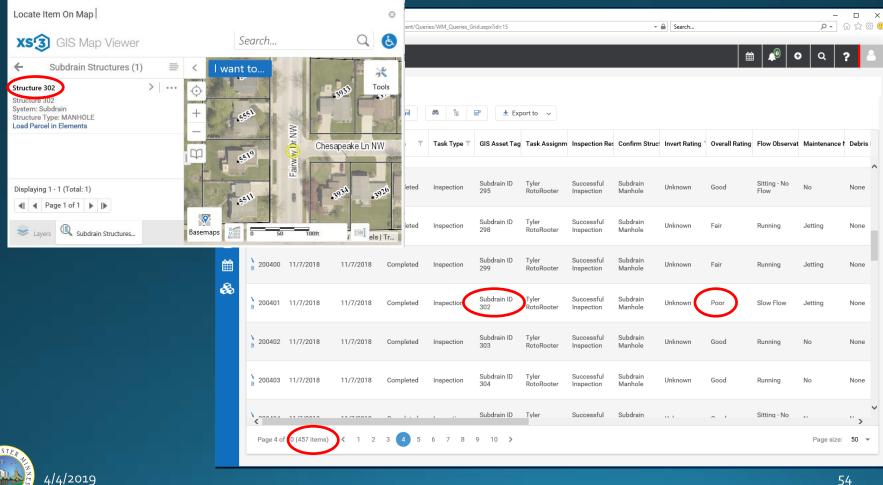
### 400+ separate Excel inspection documents each inspection

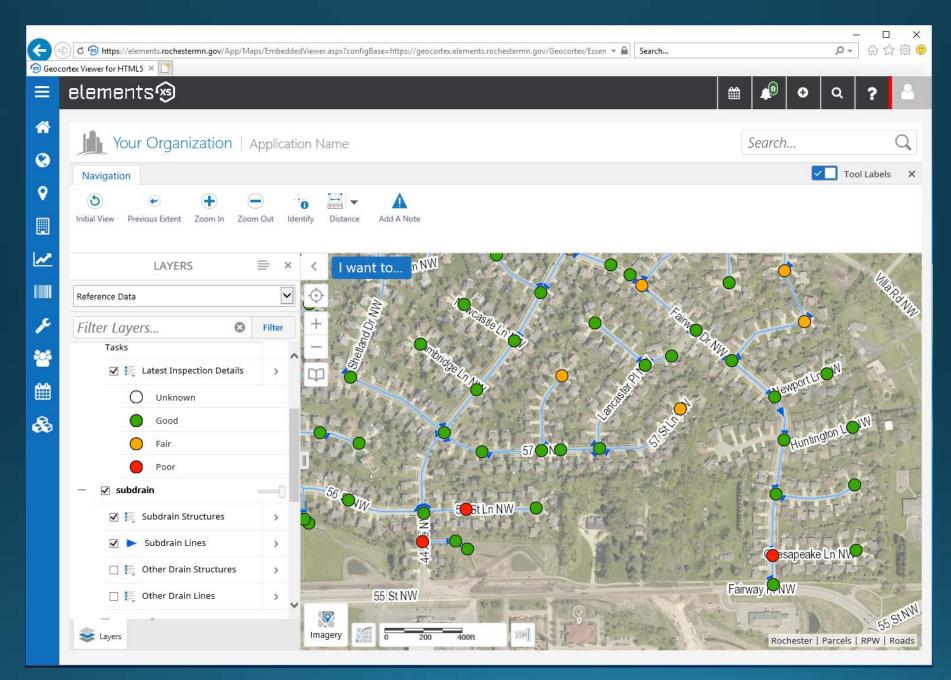




### Successes

- 450+ inspections performed several times/year that can now be tracked spatially, analyzed, reported on, etc.
  - Track real-time progress as inspections are taking place.





4/4/2019

### Successes

- Systems and workflows guiding new teammates
  - Processes no longer "unwritten" or only in our heads.
- Growth and more reports
  - Users asking for more is a sure sign of success.
  - Some "power users" are building their own reports and customizing filters.
  - Users are participating and contributing, coming up with new ideas.
  - The workflows and reports are flexible.
- Unforeseen benefits
  - Essential information shared amongst departments regarding intersecting workflows and prioritization. Example: sidewalks and forestry.
- Added capacity to the internal COR team.
  - Creation/addition of a new GIS team member has provided a terrific boost.
- Skills learned/developed within the Organization are invaluable.
  - Due to the "lean" team the PM had to learn/grow skills in programming, customization, report building, trouble-shooting, etc.



### Next Steps

- Continuing updates and improvements
- Continuing to build out reporting
- Incorporate Labor, Equipment, Materials
- Contractor Interface
- Citizen Interface \ Integration
- Two Tiered Environment (Dev / Production)



# **Questions?**

