

#### **Spatial Accounting**

Turning Strategic Asset Management Programs into Practical Decision Support Systems

Daniel Elroi President & CEO, NSGIS delroi@nsgis.com

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#### NorthSouth GIS LLC

- Consultants and Geospatial System Integrators in Ports
- Founded in 2005
- Headquarters in Los Angeles
- An integral member of the Ports industry
- Esri Gold Partner and leading partner in ports
- Makers of the Enesgy® line of software

#### **Daniel Elroi**

- Founder, CEO (helped start 4 GIS consulting firms in 3 countries)
- 32+ years in the geospatial field
- One of a handful of SMEs in GIS & ports worldwide





#### Best Known for Our Geospatial Work in Seaports

- Port of Los Angeles
- Port of Oakland
- Port of Stockton
- Port of Tacoma
- Port Tampa Bay
- Port of Vancouver
- Port of Alaska















- Port of Long Beach
- Port of San Diego
- Port of Hueneme
- Port Houston
- Port of Charleston
- Port Everglades
- Port of Longview
- Port of Columbia County









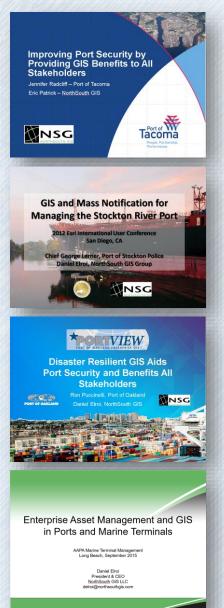


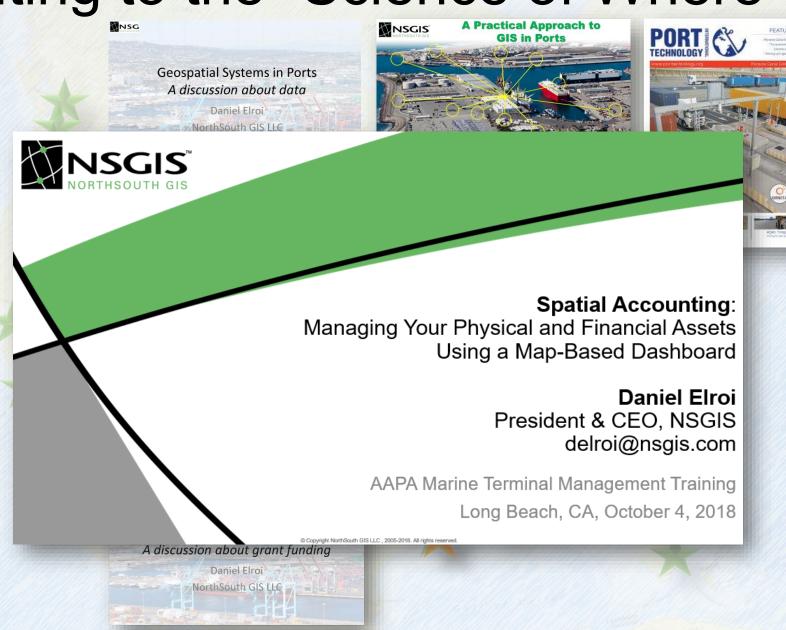






#### Contributing to the "Science of Where" in Ports



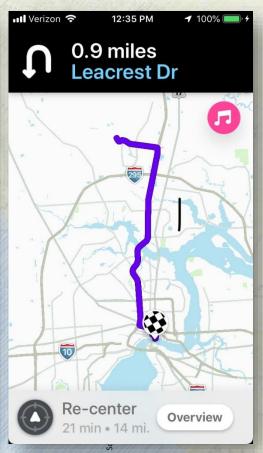




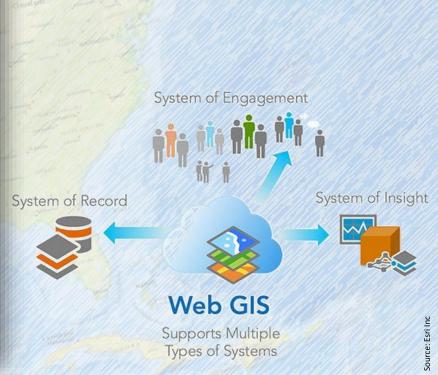
### Dispelling that GIS is Just a System of Record

- GIS as a System of Record
- GIS as a System of Insight
- GIS as a System of Engagement









# Main Areas of Applicability for the Enterprise

- Information Management
- Document Management
- Security Management
- Property Management
- Facilities Management
- Asset Management

## Strategic Asset Management (SAM)

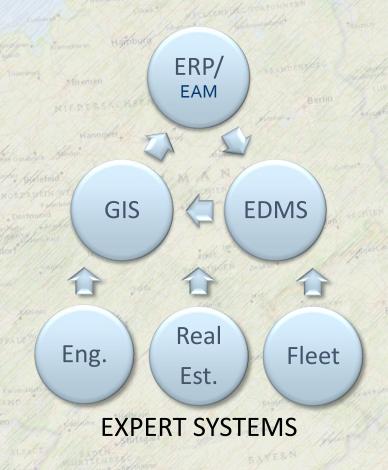
#### Standards

- Are: Specifications
- Are not: Prescriptions
- Do: Provide guidelines
- Do not: Provide implementation
- Can: Help design a SAM program
- Can not: Get a program off the ground



### Key Information Management Components

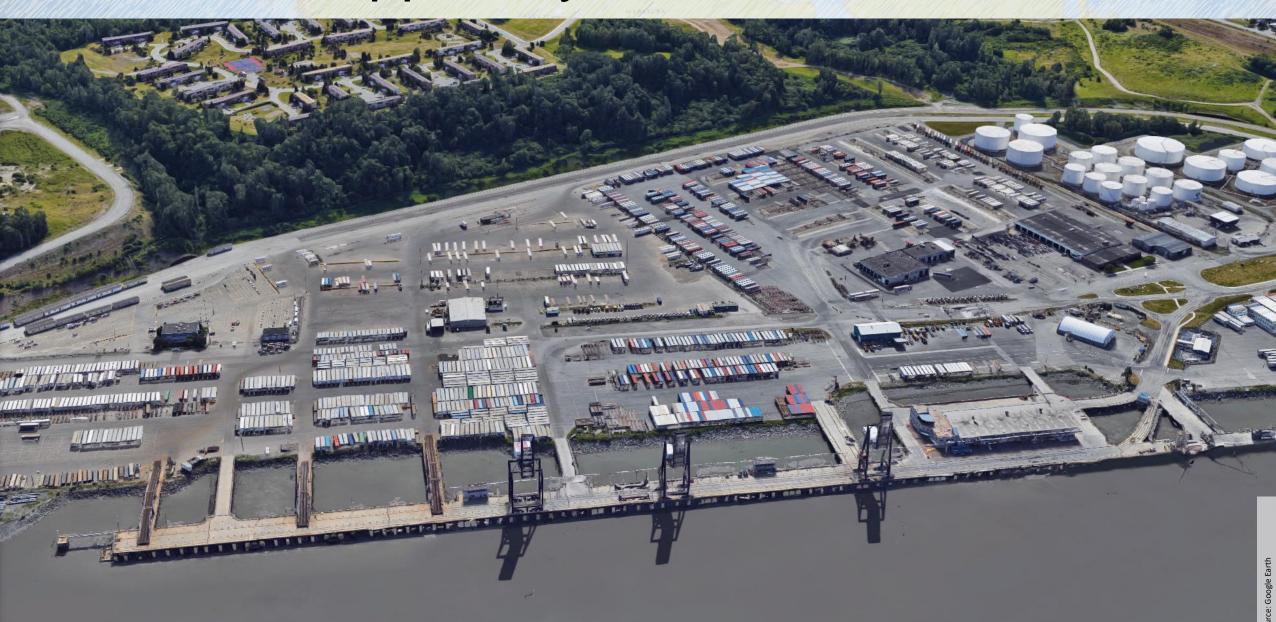
- Port of Rotterdam seen as the gold standard
- Foundation Systems
  - ERP Enterprise Resource Planning, or
  - EAM Enterprise Asset Management
  - GIS Geographic Information System
  - EDMS Electronic Document Management System
- Expert Systems
  - Engineering
    - Condition Assessment
    - Materials Testing and Lifecycle Modeling
  - Real Estate
    - Mass Assessment
    - Comparables Analysis
  - Fleet
    - Automotive diagnostics

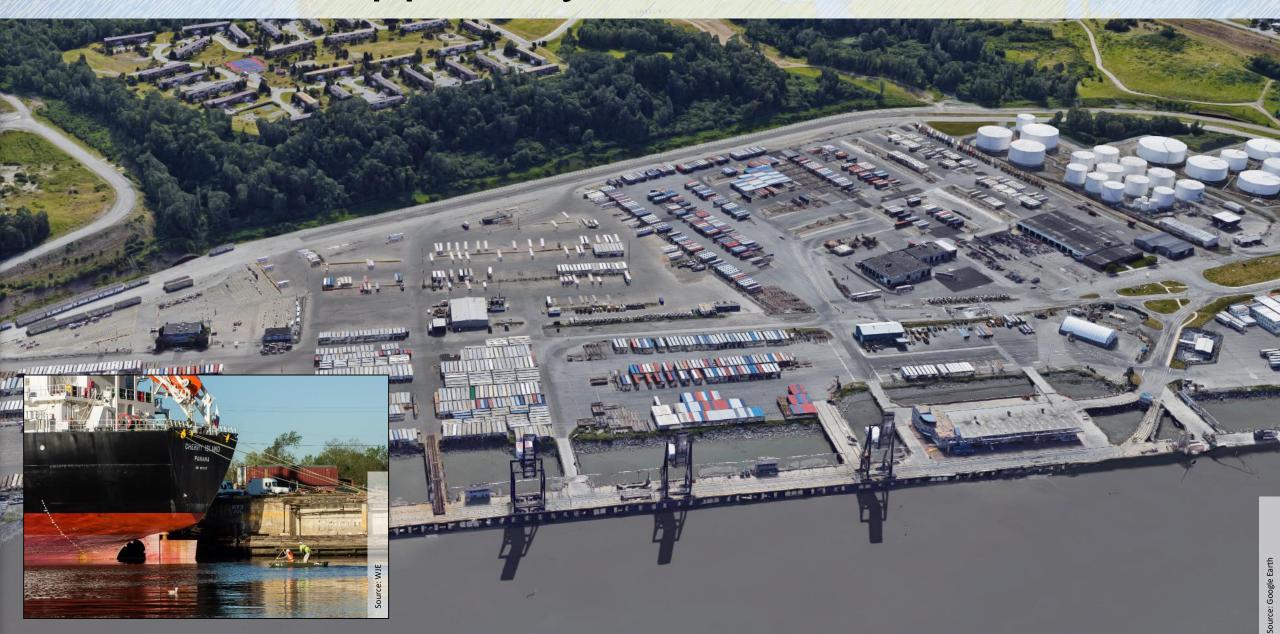


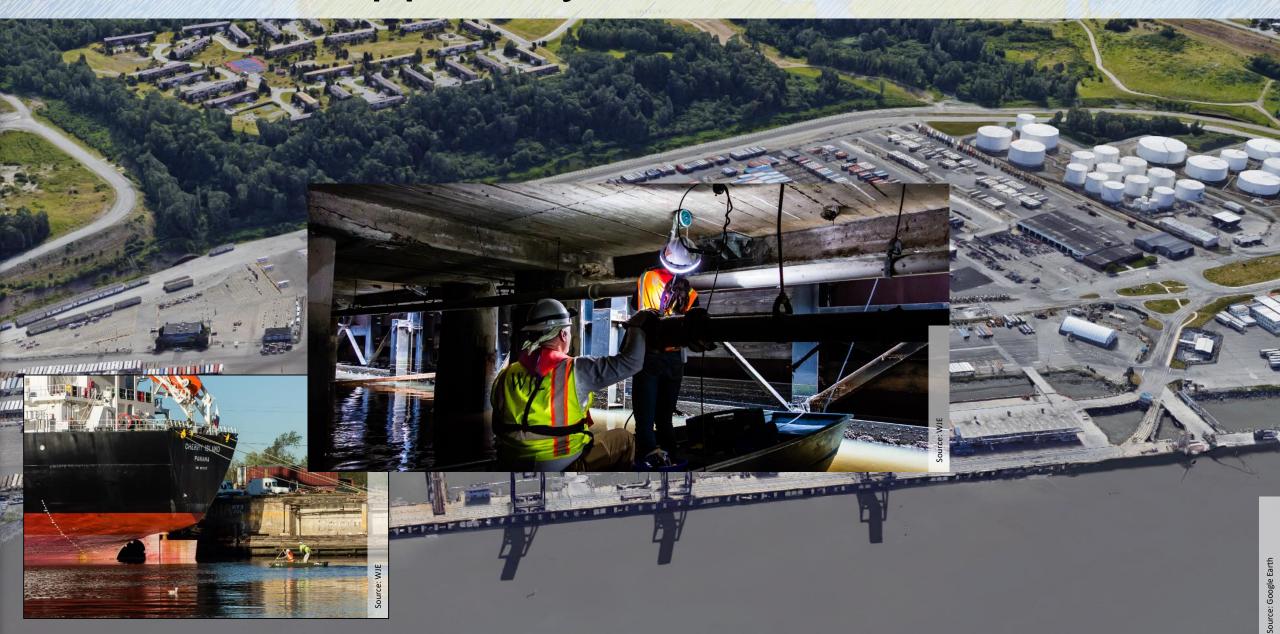
## Begishicon Batipor May steement Components

- What is your current "decision support system"?
  - Your brain, memory, knowing where to find information
  - Your institutional knowledge, your "old timers"
  - Your gut feel, your intuition
- What does it lack?
  - Accountability
  - Transparency
  - Repeatability
  - Scalability
  - Resiliency
- What is the new Decision Support System?
  - Let's take a look

Strategic Asset Management







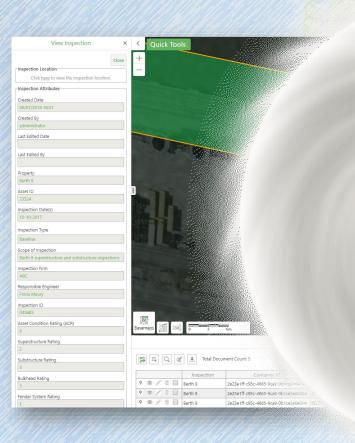




- "It's broken, it needs to be fixed, now!"
- "We'll have to stop operations if we don't fix"
- "We'll have to stop operations in order to fix"
- "Somebody is going to get hurt"
- "We're not meeting the lease terms"
- "It's not in the budget"
- "We should have inspected sooner"

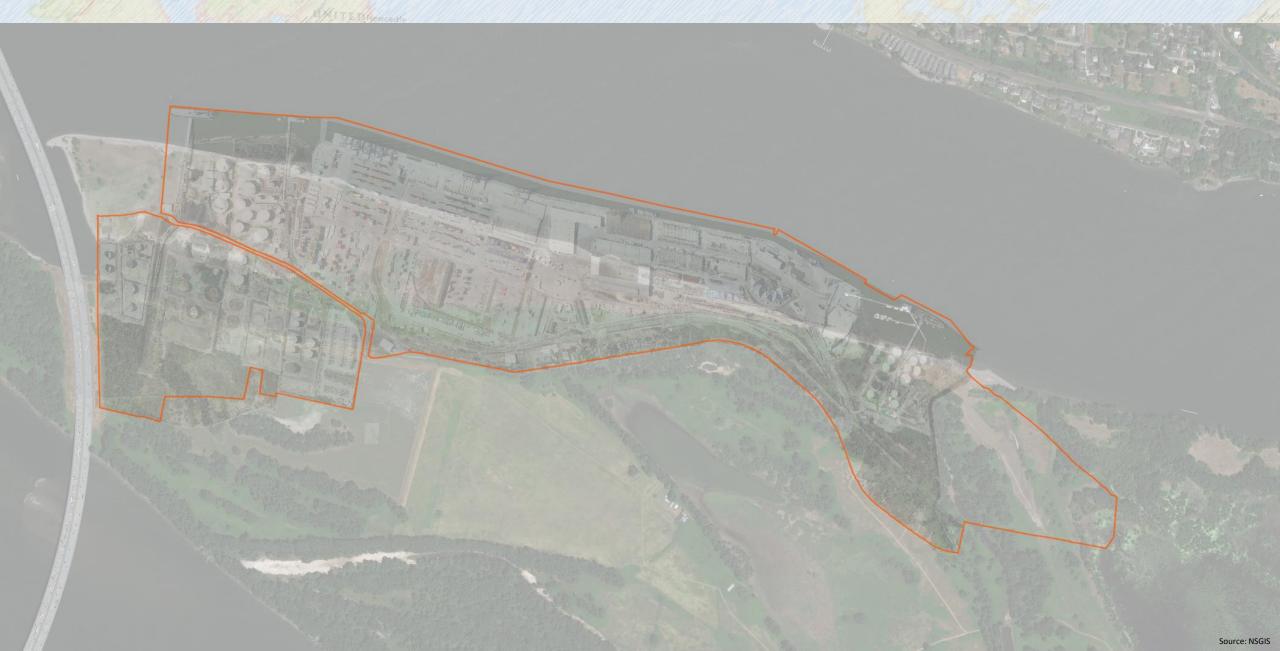
- But...
- "It's broken, it needs to be fixed, now!"



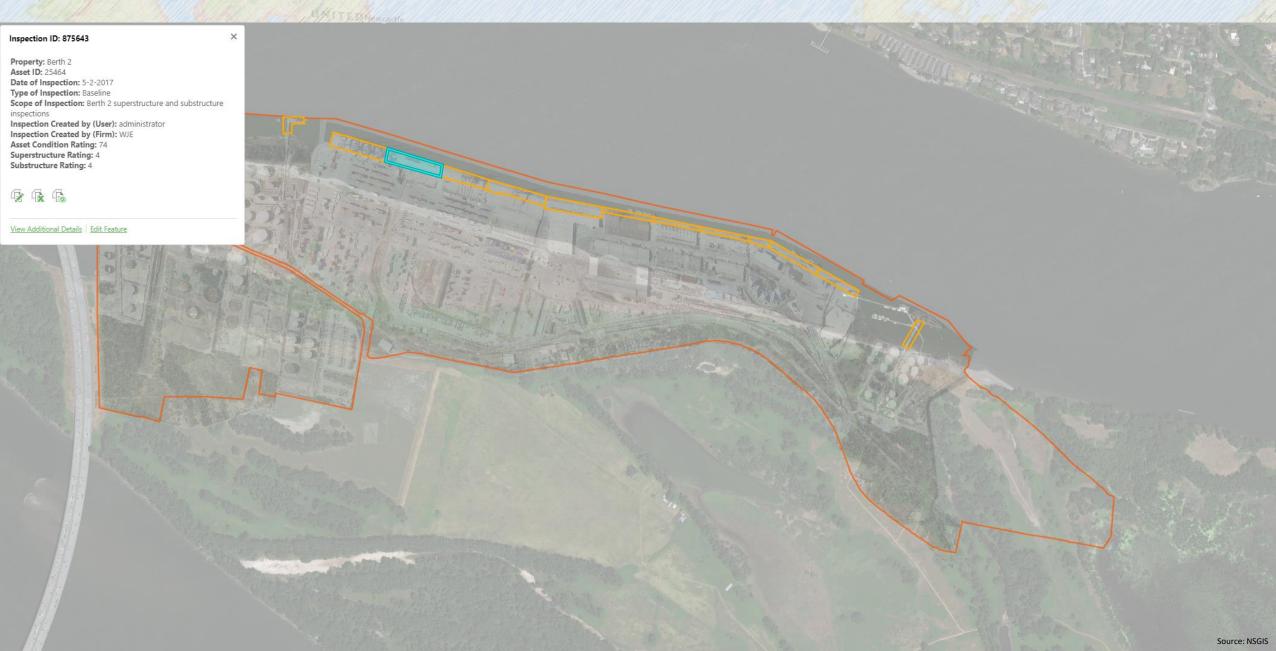




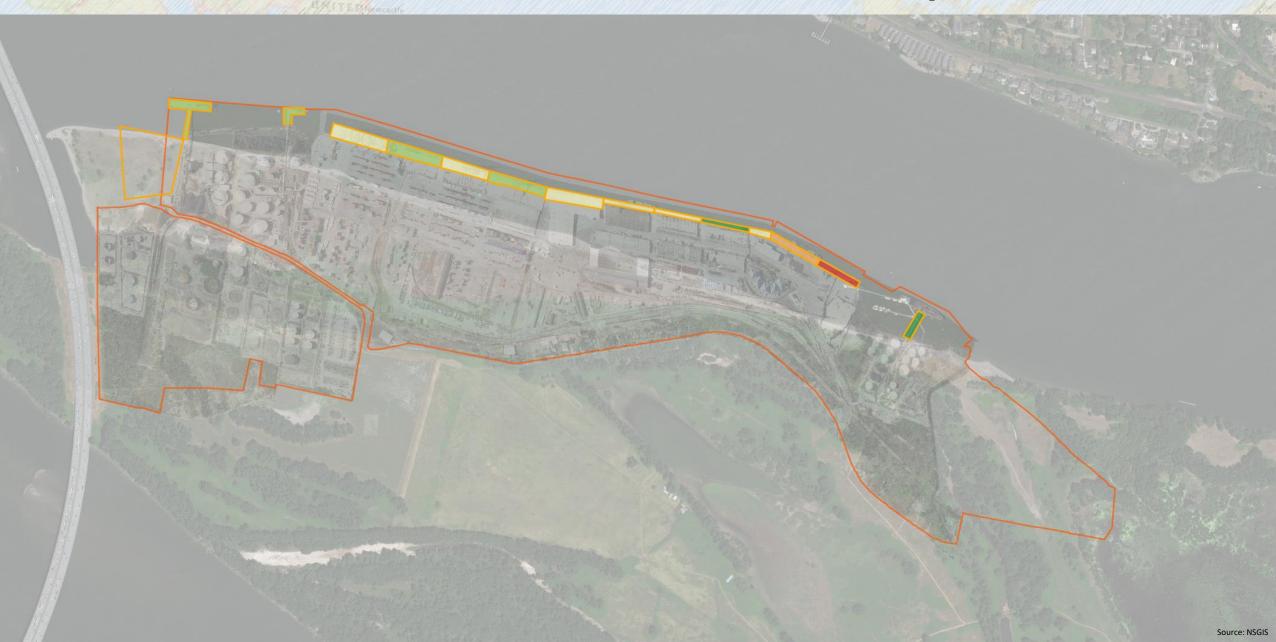
#### Let's Start with Condition Assessments



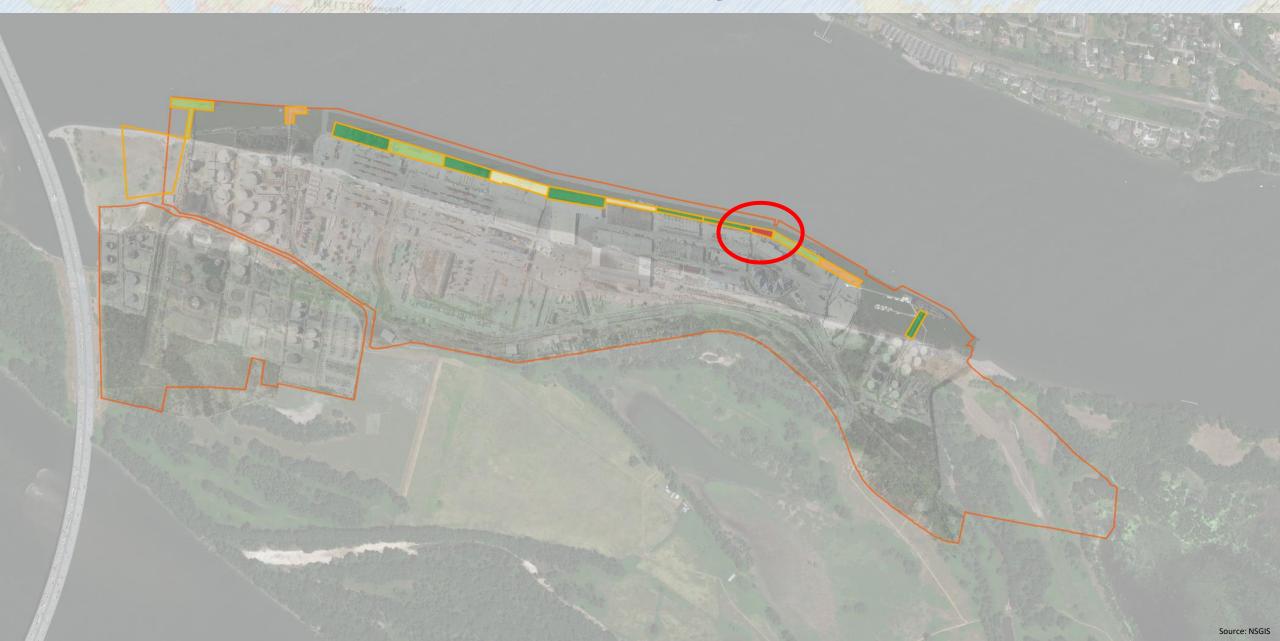
#### Put All Assessments in a Database



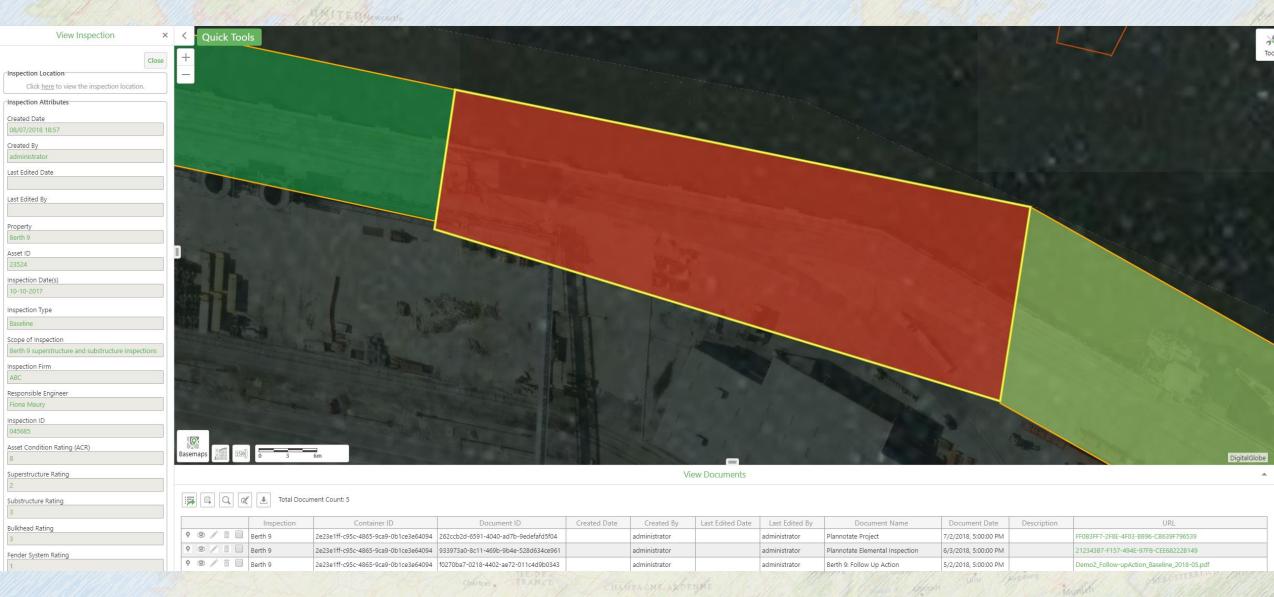
# Visualize the Condition of One Aspect



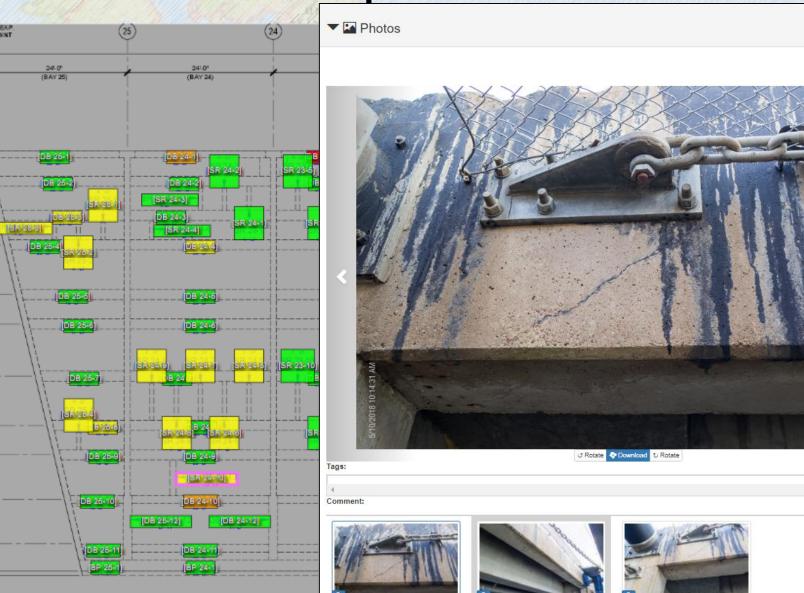
## Look at the Overall Rating to Identify Trouble



#### Access Current and Past Assessments



#### Retrieve Inspection Records



**Maritime Asset** The Port Follow-up Actions Page 1 of 24 Cargo Terminal Wharf 101 ⊠ Baseline □ Routine □ Special May 9 & 10, 2018 Prime: Wiss, Janney, Elstner Associates, Inc. (WJE) Underwater: N/A Patrick Marra, WJE July 25, 2018 Reported By Follow-up Actions ⊠ Routine Item No.: Priority Component Superstructure DB 4-1, DB 5-1, DB 6-1, DB 7-1, DB 8-1. DB 9-1 **Element Type:** RC Deck Beams DB 10-1, DB 11-1, DB 15-1, DB 16-1, DB 18-1, **Condition Identified** Diagonal crack present at ends of frontal beams, possibly indicative of shear distress. Condition may reflect past overloading or underlying deficiency in structure

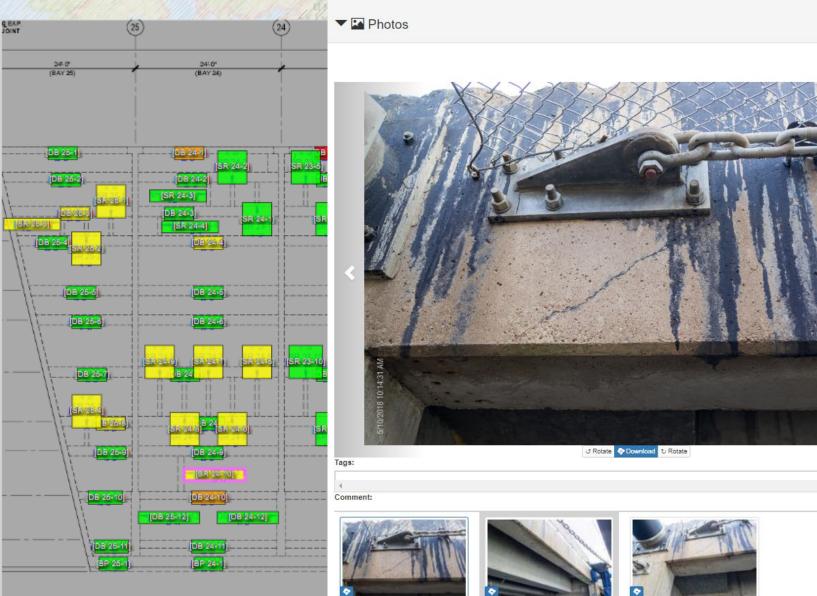
Figure 1. Typical appearance of diagonal crack on front beam, marked in red for visibility. Note that the crack shown does not appear to originate at the supporting element.

SAMPLE





### Let's Not Stop There!



The Port Maritime Asset Follow-up Actions

rgo Terminal – Wharf 101 July 25, 2018 Page 1 of 24

Property: Cargo Terminal Asset ID: Wharf 101

Inspection Type: ⊠Baseline □Routine □ Special Inspection Date: May 9 & 10, 2018

Scope of Inspection
Inspection Firm(s): Prime: Wiss, Janney, Elstner Associates, Inc. (WJE)

Underwater: N/A

Reported By: Patrick Marra, WJE Report Date: July 25, 2018

	1	Follow-up Acti	0113	
Item No.:	1	Priority:	Priority	⊠Routine
Component:	Superstructure			
Element Type:	RC Deck Beams	Element ID(s):		I, DB 6-1, DB 7-1, DB 8-1. DB 9-1, 1-1, DB 15-1, DB 16-1, DB 18-1, 3-1,
Condition Identified:	Diagonal crack present at ends of frontal beams, possibly indicative of shear distress.			
Reason for action:	Condition may reflect past overloading or underlying deficiency in structure.			



Figure 1. Typical appearance of diagonal crack on front beam, marked in red for visibility. Note that the crack shown does not appear to originate at the supporting element.

SAMPLE







## **Use Spatial Accounting!**

- A visual dashboard into your data, maps and documents
- Manage both physical and financial assets together
- Including real estate

# Map Your Billing System



# Connect To Your Lease Management



# Connect To Your Work Order System



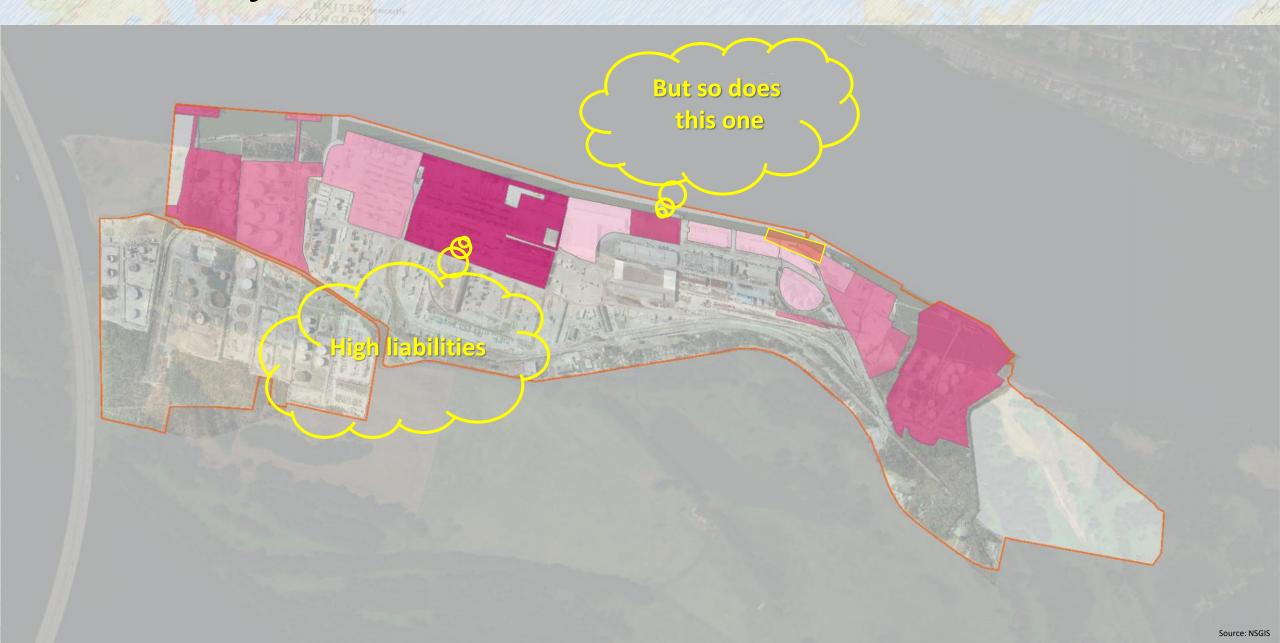
## Visual Profit & Loss Report: Cash Flow Map



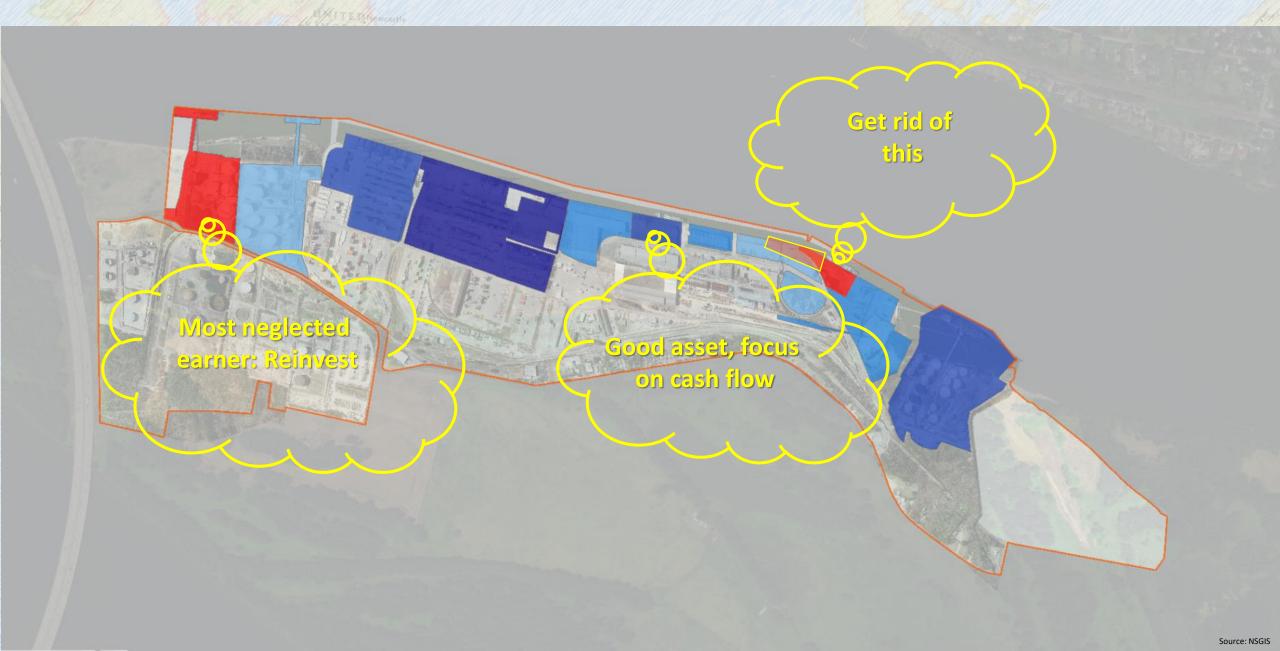
# Add The Asset Register



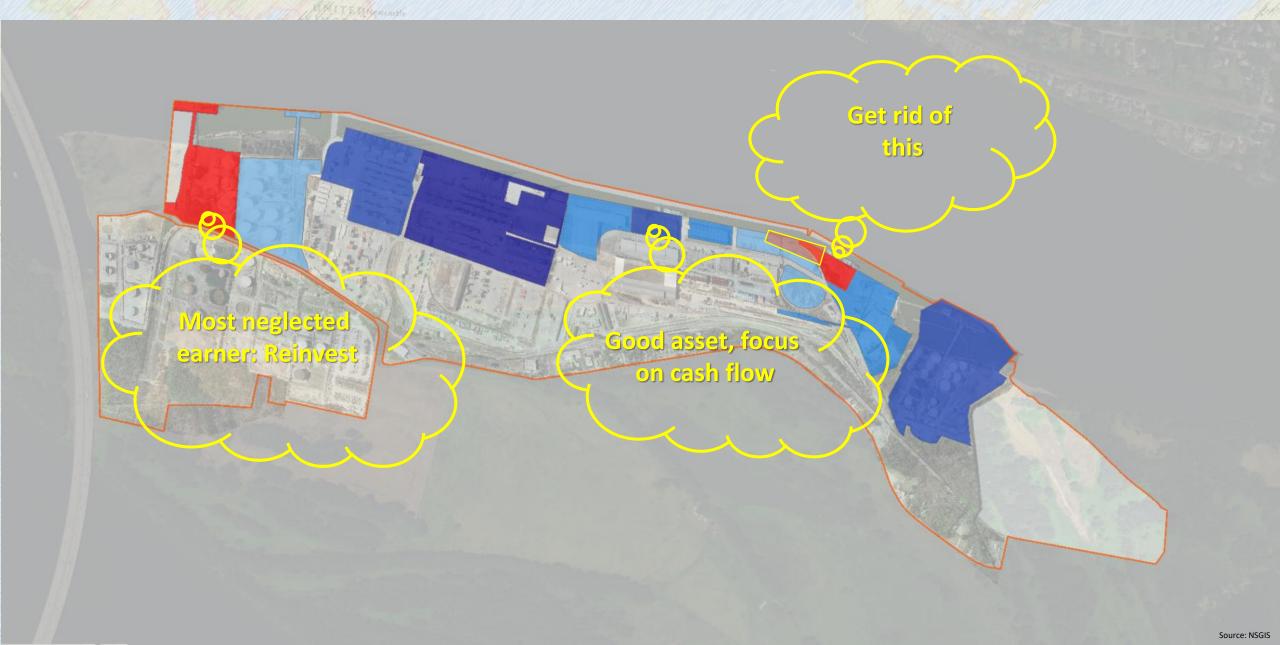
# Quantify All Liabilities



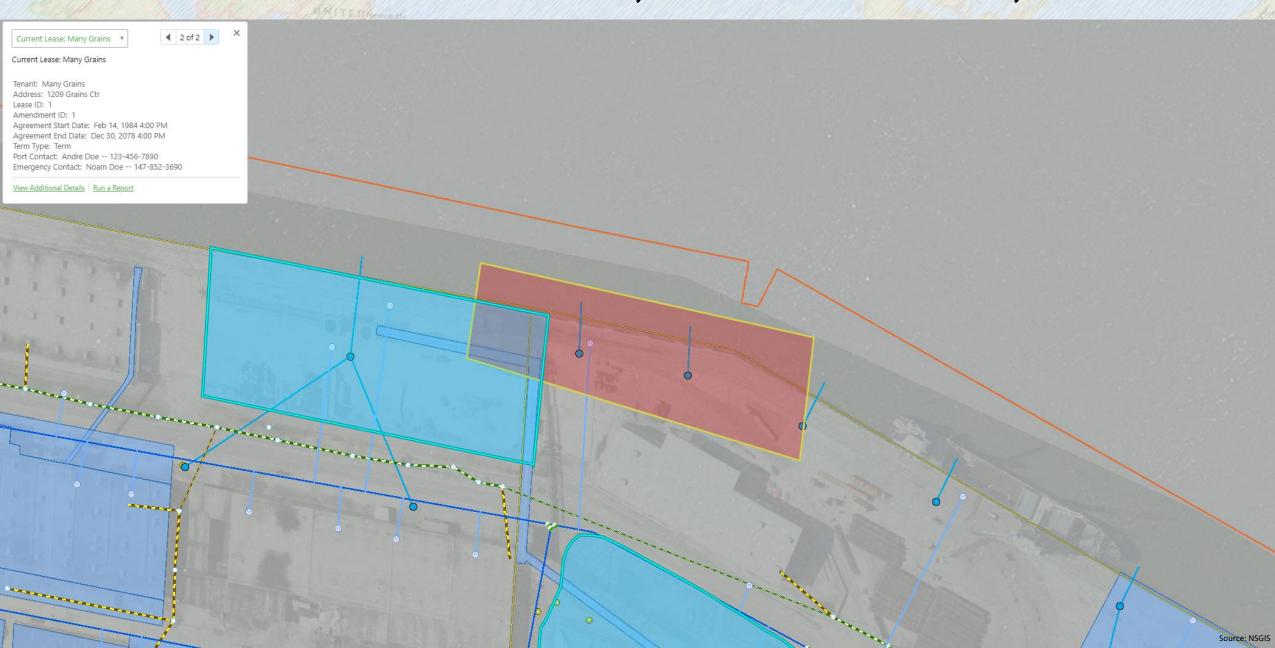
#### Visual Balance Sheet: Net Asset Values



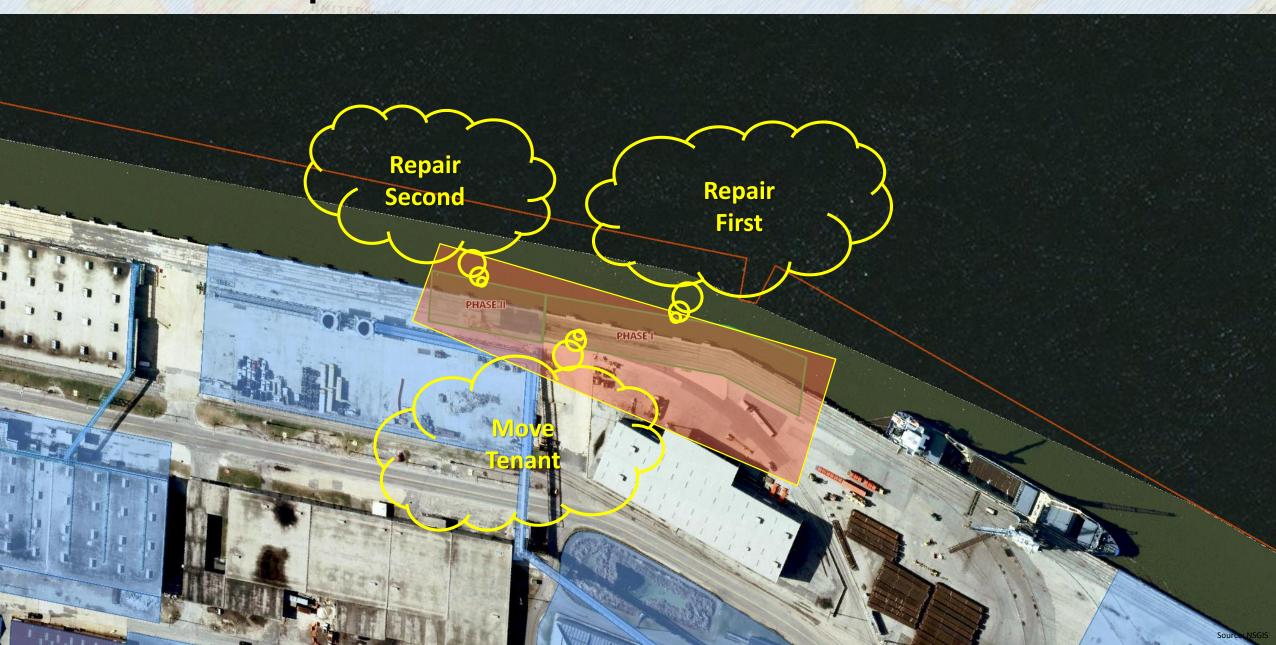
## "But Wait, There is More..."



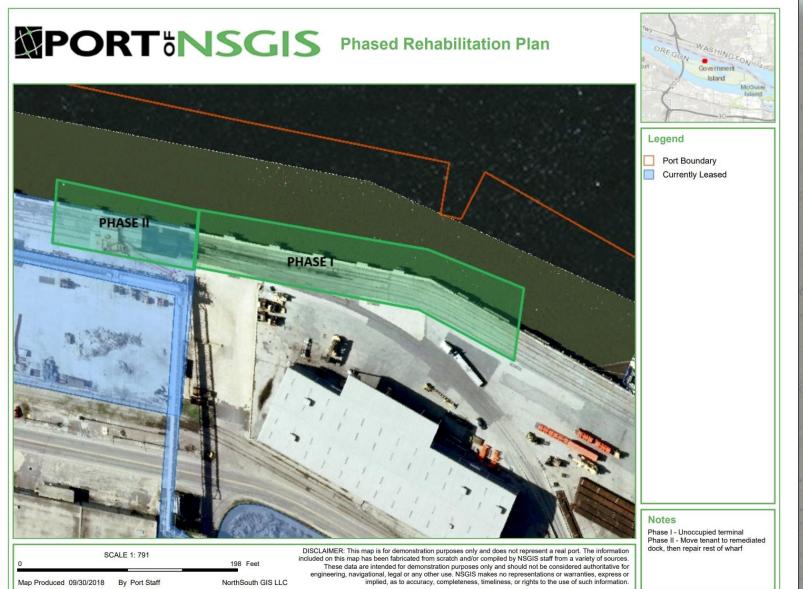
### Visualize Your Utilities, Infrastructure, Leases

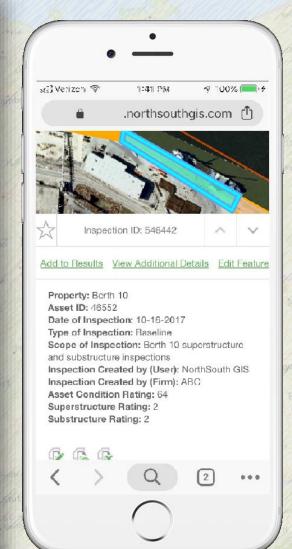


# Use a Map-Based Dashboard



# Operational Decision Support & Planning Tool





### Let's Recap

- Spatial Accounting is the concept of:
  - Connecting different Systems of Record using geospatial systems, especially GIS
  - Implementing the principles of Strategic Asset Management as a Decision Support System
  - Delivering it as a map-enabled System of Engagement
- This requires:
  - Existing systems to be connected
  - New systems to be added
  - Collaboration across the enterprise

## How Does One Get There, Incrementally?

- "We have nothing" or "We have pieces"
- "We don't have the experts to do this"
- "I've heard this is very expensive"
- "We've tried this before, it failed"
- "I already have a day job!"
- "We're just a small port"
- "Channel deepening"
- "Cyber-security"
- "Something urgent came up"
- "My commissioners don't get it"



# GIS Strategic Plans

What: Interviews across port, budget, staffing, 100s actions

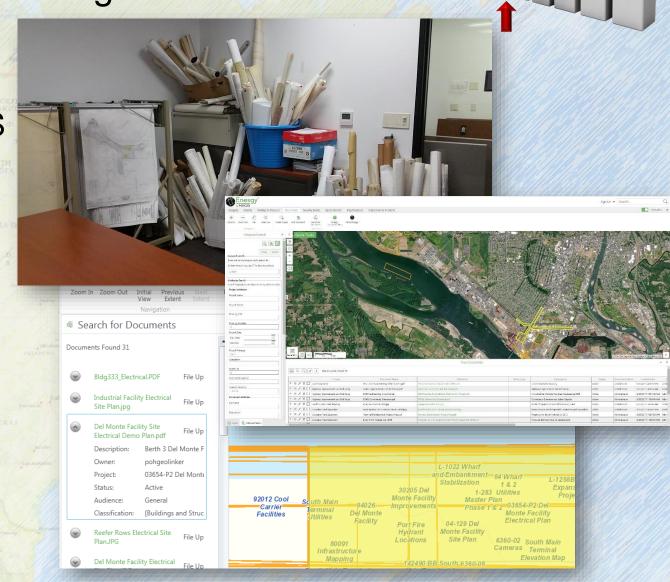
- · ROI:
  - Coordinated vision
  - Sync with port master plan & strategic asset management plans
  - Road map
  - Basis for budget requests
  - Bridge gap with IT
  - Better communication with leadership



## Assessment of Paper Records

What: Catalog paper, scanned and digital documents

- · ROI:
  - Catalog of available data
  - Prioritization for conversion to GIS so only most reliable data is used
  - Gain value from GIS even before starting on data conversion and even from documents that are never converted
  - Map- and metadata-based search and retrieval of documents



## Spatial Index of Digital Documents

What: Spatially search and retrieve record drawings

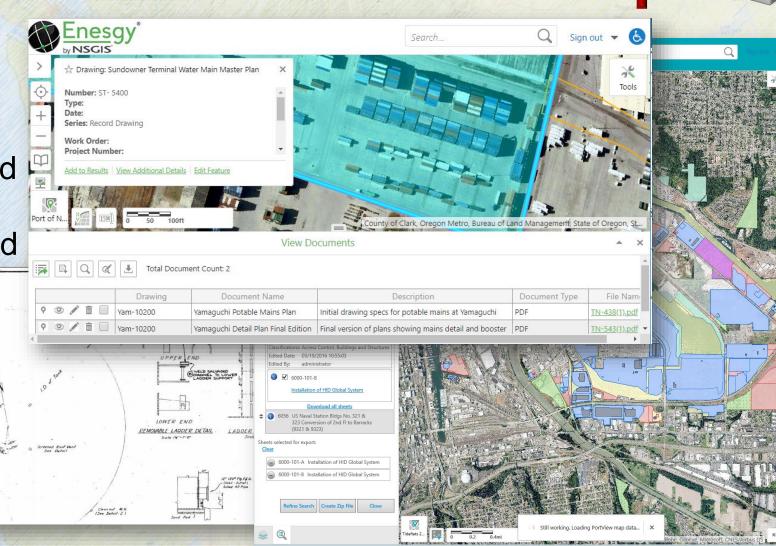
· ROI:

 Reduced risk of using wrong or incomplete document sets

Easier for new staff to find documents

Some ports have reported

90%+
reduction in search for as-builts



## Rectification of Scanned CAD Drawings

What: Overlay images spatially without conversion to GIS

#### · ROI:

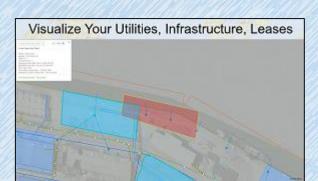
- Much easier to use than disjointed standalone scanned drawings
- Can stitch drawing sets together
- Retain details that will never be converted to GIS
- Save one-of-a-kind drawings before they are destroyed
- Tangible value from document scanning

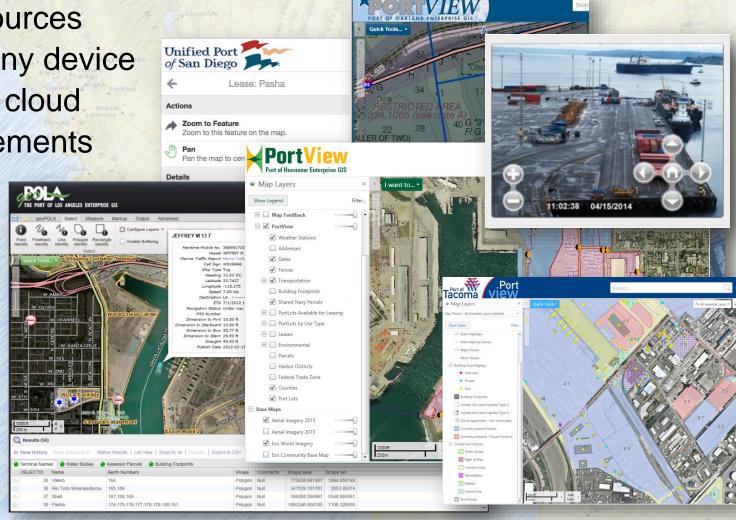


### Data Conversion and Publication

• What: Conversion of 100s map layers from paper, CAD, GIS

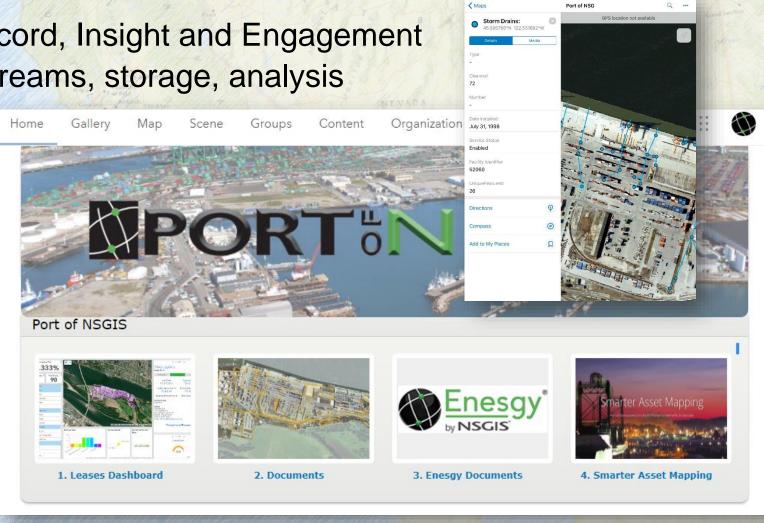
- · ROI:
  - Vetted, authoritative data sources
  - Available any time and on any device
  - Stored on-premise or in the cloud
  - Tools for sketches, measurements
  - Integrates external data sources from city, county, state, NOAA, USACE, etc.
  - Integrates dynamic data with static data sources





## Esri Geospatial Cloud

- What: ArcGIS Online\* deployment
- · ROI:
  - Complete Systems of Record, Insight and Engagement
  - Economical cloud data streams, storage, analysis
  - Available on any device, anytime and anywhere (including offline)
  - Backed by Esri's desktop software
  - Supports third-party software like Enesgy
  - \* also Portal for ArcGIS



## Field Data Capture and Verification

What: Verification and documentation of assets in the field

· ROI:

Increase confidence in data

Field apps eliminate paper

Can inspect conditions while verifying locations

- Capture photos
- Instant feedback to office

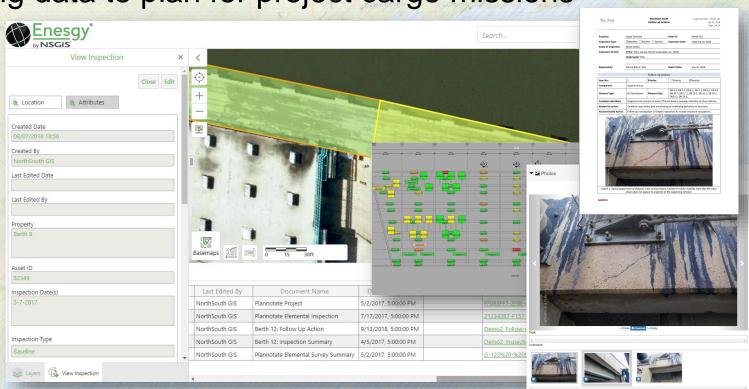


### Condition Assessment Management

· What: Combine data, reports, maps, photos in one system

- · ROI:
  - Faster, more precise access to condition data, not just recommendations
  - Comparison of conditions across space and time
  - Integration with load-bearing data to plan for project cargo missions
  - Integration of data from different consultants and from internal assessments
  - Overlay with other map layers

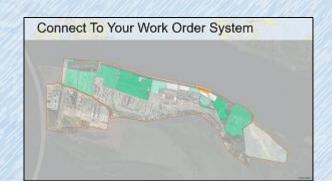


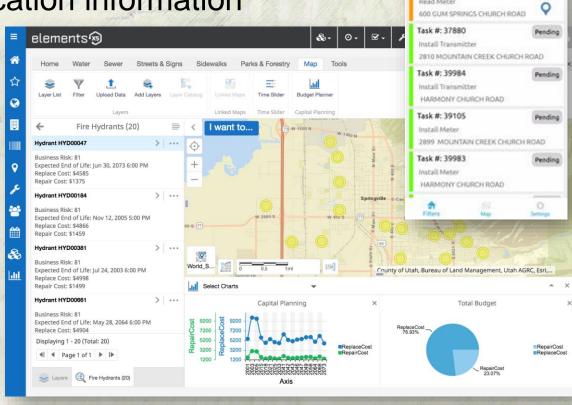


## Facilities and Work Order System

What: GIS-based work order system, linked to finance & docs

- · ROI:
  - Electronic work orders based on mapped assets
  - Work, labor and cost history retained in a database
  - Correlated to other systems through location information
  - Built-in scheduling and load balancing
  - Inventory control
  - Preventive maintenance planning
  - No paper records
  - Risk-based prioritization





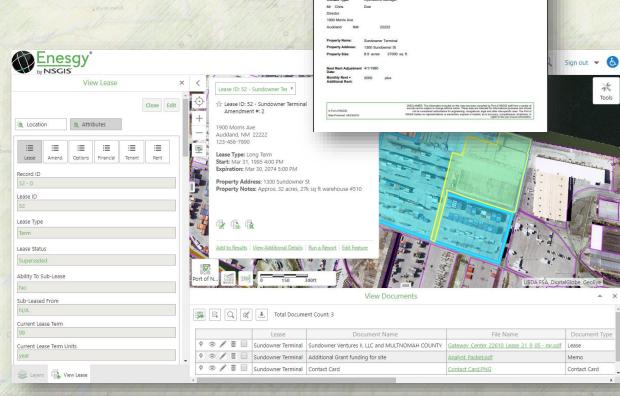
## Long-Term Lease Management

What: Management of commercial property portfolio

· ROI:

- Single map-based view of all properties
- Differentiate between leased, available, expiring leases
- Searchable, integrated data, maps and documents
- Lease abstract and other reports
- Query and analysis capabilities
- Alerts and email notifications
- Linkable to document management system
- Executive dashboard

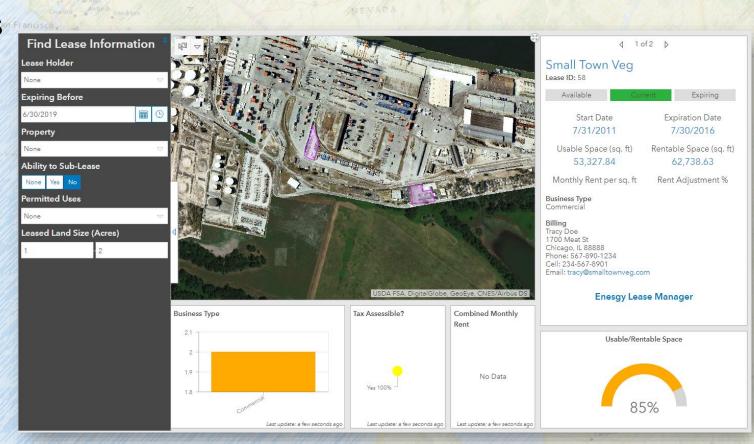




MPORT NSGIS

## Short-Term Space Assignments/Leases

- What: Short-term space assignments/leases
- · ROI:
  - GIS-power system used to drive the entire process
  - Propose, measure, calculate rates
  - Link and search documents
  - Create instructions for accounting department
  - Review history
  - Send alerts



## Permit & Project Cargo Management

 What: Single source of information for permitting and project cargo mission planning



#### · ROI:

- Single source of information on dock capacity, condition assessments, utilities, clearance, other cargo missions
- Sketch, measure, calculate
- Propose, notify, track
- Report
- Search by description, location and history



## Capital Projects Management

What: Tracking capital projects, exposing through dashboard

· ROI:

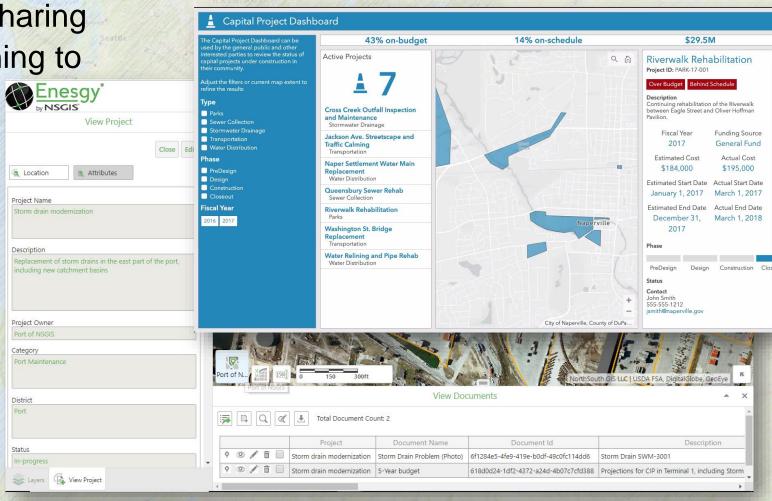
Internal tracking, public sharing

Can be used from beginning to

drive the process

 Linkable to document management system





Do you lack systems or connectivity?



Or only have enterprise systems for finance?



Or have some GIS but it stands on its own?



Or you have some GIS but it isn't an enterprise system?



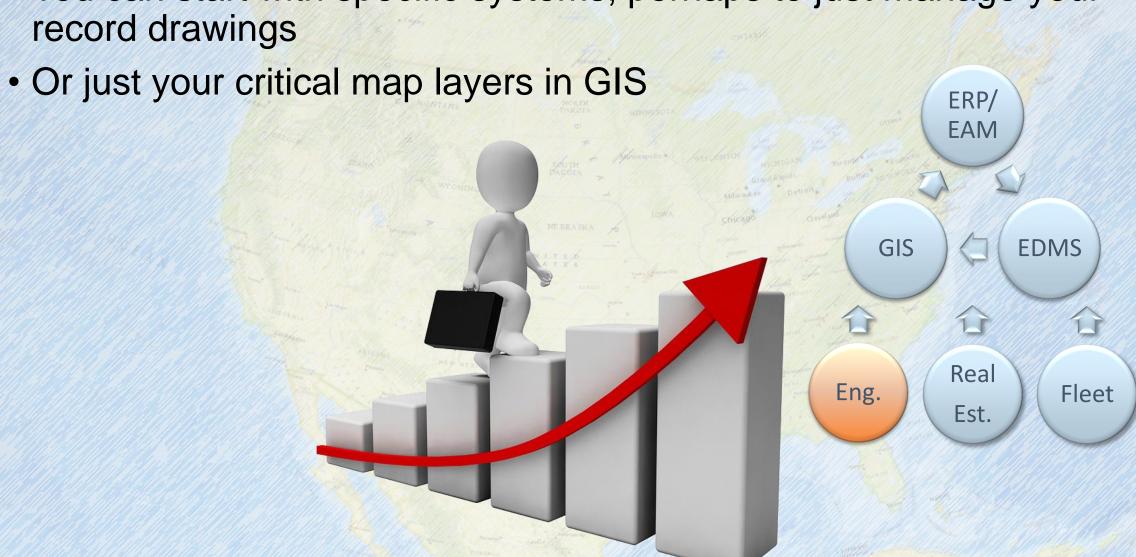
 Or your GIS is connected to some enterprise systems but is not itself an enterprise system?



Perhaps you are still managing everything with Word and Excel?



 You can start with specific systems, perhaps to just manage your record drawings



Or have a couple of systems, one for engineering and one for real estate



- As long as you have a plan for how you will eventually bring these systems together using the principles of Spatial Accounting
- Your port too can build a Decision Support System that will reflect your Strategic Asset Management Plan
- Not surprisingly, best outcomes if you
  - Have a plan
  - Get buy-in and budget
  - Standardize on a common platform
  - Learn from your peers, contract with experts, grow and hire people to sustain and grow

**Spatial Accounting** 

turns

Strategic Asset Management Plan

into

**Decision Support System** 



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