

Project Roadmap



DATA NEEDS

01

PRIMARY DATA (REPORTS & KPIS)

What does the client need to see on a daily, weekly and monthly basis? What are the essential Data Capture Fields?

02

SECONDARY DATA (LINKED DATA)

What do internal stakeholders need to work with other functions? (SHEQ, Compliance, Payroll, Invoicing)

03

FIELD WORK ALLOCATION

How are you notified of work required and how will you in turn allocate that work?

We always recommend working back from the reporting and KPI needs.

PROCESS FLOWCHART

Map the business process from instigation till its conclusion, including KPI delivery.

01

PROTOTYPING

DATA FLOW CHART

Shows how information needs to move via API or CSV and how logic loops and approval processes need to work.

02

DATA CAPTURE TEMPLATE

Ensure that data capture satisfies the needs of both internal and external stakeholders.

03

Gain a clear idea on the hierarchy and field structure on GeoPal.

STRUCTURE & HIERARCHY

01

CUSTOM FIELDS

Add custom fields to templates, CRM items and assets/project data in order to enable API connections.

02

DATA HIERARCHY

Establish relationships between different forms and data objects like assets or projects.

Ensure that contract data can be stored and the workflow can move through the system.

OPTION 1: ERP EXTENSION

The customer uses their ERP and GeoPal allows it to reach into the field and deliver the data back live.

01

DATA OUTPUTS

OPTION 2: MAIL SYSTEM

Data is automatically collated into PDFs and Excel reports before being emailed to the end client.

02

OPTION 3: HYBRID

Some ERP connection sends data at the same time the client is sent a PoD PDF via email.

03

OPTION 4: BI SOURCE

Tools such as Power BI, Tableau or Qlik are used to create dashboards to monitor KPIs.

04

We work with the client to create data outputs and match contract needs with stakeholders' needs.

UAT & LAUNCH

01

TASK ALLOCATION

Test work allocation and data transformation at scale.

02

FIELD TESTS

Pinpoint faults in form logic, needless questions and missing options.

03

DATA REVIEW

The office team reviews captured information and looks for consistency & completeness.

04

REPORT GENERATION

Internal reports are reviewed & the client gets a live data sample to ensure that the right KPIs are captured.

05

API TESTS

The API is connecting to other systems, BI Tools are updating correctly, invoice data has come through and the ERP process has moved forward correctly.

Having established the data needs, mapped the process, built the prototypes, created the field structure, and written the reports, UAT is about making sure the system as a whole is working properly.

Field Operations.Connected.

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