



Podium
ENERGY CONSULTANCY

Podium Energy Consultancy: Operational Planning Tool Overview



OVERVIEW



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WELCOME

Joe Walton

Managing Director

Welcome to the Introduction and Overall Process Description of the Operational Planning Tool (OPT) by Podium Energy Consultancy.

In today's complex and fast-evolving energy landscape, organisations are under increasing pressure to deliver projects safely, efficiently, and with full transparency across the entire asset lifecycle. The Operational Planning Tool (OPT) has been developed to address these challenges by providing a comprehensive, integrated digital solution that enables effective operational control, enhanced collaboration, and data-driven decision-making.

Podium's OPT serves as a centralised platform designed to streamline key operational processes within the energy sector. It brings together multiple functional capabilities—ranging from asset management and work planning to documentation control, progress reporting, and stock management—into a single, cohesive system. By eliminating data silos and improving information accessibility, OPT helps organisations optimise resource utilisation, maintain regulatory compliance, and improve overall project performance.

At its core, OPT supports the structured planning and execution of work activities. It enables users to define, schedule, and track tasks in alignment with asset requirements and operational priorities. Through its robust documentation management features, the tool ensures that all project-related information is securely stored, version-controlled, and readily available to stakeholders, thereby reducing risks associated with outdated or inconsistent data.

In addition, OPT enhances visibility across operations through real-time progress reporting and intuitive dashboard interfaces. These capabilities allow project teams and management to monitor key performance indicators (KPIs), identify potential issues early, and make informed decisions based on accurate and up-to-date information. The inclusion of stock management functionality further ensures that materials and resources are effectively tracked and allocated, minimising delays and inefficiencies.

This case study provides an overview of how OPT is applied in practice, outlining its core processes, key functionalities, and the value it delivers to energy sector organisations. It highlights how the tool supports improved operational efficiency, strengthens governance, and enables a more proactive and coordinated approach to project execution.

Many Thanks,



INTRODUCTION



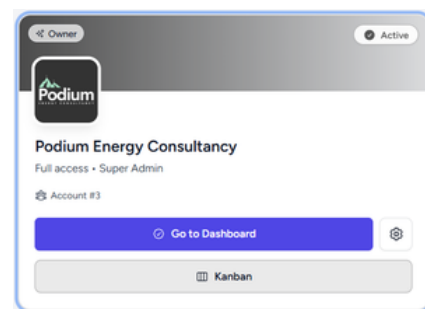


ACCOUNTS & MODULES

The Operational Planning Tool (OPT) is a web-based application accessed via a secure online login, where each user signs in with their own credentials. Once logged in, users are presented with a personalised account dashboard that provides access to the specific modules they are subscribed to, allowing them to efficiently navigate and manage their assigned operational functions.



The 'Account' level shows the companies that are currently live and using the OPT. For a specific 'Account', that business will only be able to see their own, like the example of 'Podium Energy Consultancy' shown. The example here shows Podium's specific user interface rather than a Client's view. Once logged in, the user then selects 'Go to Dashboard' on their account tab.



The 'Groups', or 'Modules' as each one is named, are selected from the Overview Dashboard as mentioned.

Once chosen, the Assets within the group will then be visible, and the data within can be interrogated, updated, and in specific groups, overview and status can be seen within the group (e.g. Stock levels, progress, date expiries, etc.)



INTRODUCTION



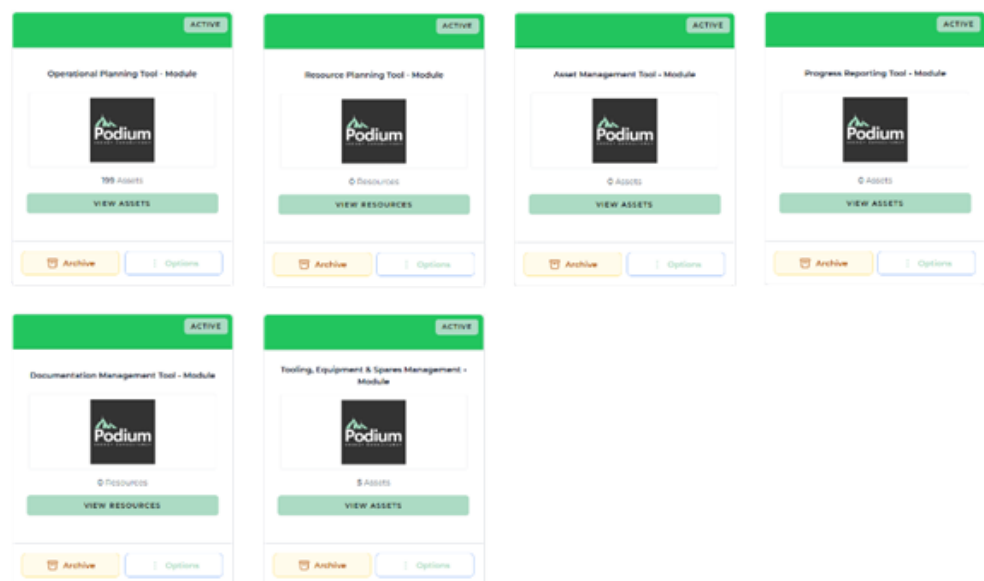


OVERVIEW DASHBOARD

The Overview Dashboard within the 'Account' accessed shows the modules that are currently live and in use for your business, that are active.

These modules all have different functions relating to:

- Operational Planning
- Resource Planning
- Asset Management
- Progress Reporting
- Tooling, Equipment and Spares Management
- Documentation Management



INTRODUCTION



The 'Assets', are visible once the Group is selected.

The term 'Asset' is renamed in each module, so to be specific with the intent and purpose for each of the Modules.



INTRODUCTION

Showing 1 to 9 of 9 results

Show: 100

[+ Add Item](#)
[Stock Level](#)
[Unit Price](#)
[Item Level](#)
[Material Level](#)
[Part Description](#)
[Internal Identifier](#)
[External Tags](#)
[Associated Assets](#)

	Mining ID	Name	Internal ID	Stock	Price	Alert Level	Maintain L.e.	Desc	Tags	Associated Assets
		Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	
	#210	SRL Pull Down Rope - 16	SRL Rope - 16m	0	0.00	0	0		SRL Pull Down Rope - 16m	
	#214	SRL Pull Down Rope - 26	SRL Rope - 26m	0	0.00	0	0		SRL Pull Down Rope - 26m	
	#215	M2 Stainless Steel Nuts	M2 Nut	0	0.00	0	0		M2 SS Nuts	
	#216	M2 x 30 SS Bolts	M2x30 Bolt	0	0.00	0	0		M2 x 30 SS Bolts	
	#227	M2 SS Washers	M2 Washer	0	0.00	0	0		M2 SS Washers	
	#228	Latchkeys 25M Self Ret	SRL-RL	0	0.00	0	0			
	#229	Latchkeys 15M Self Ret	SRL-EL	0	0.00	0	0			

The screenshot displays the Podium software interface. On the left, a sidebar contains a 'Progress Reporting Tool - Module' section with a 'Podium' logo and an 'Assets' button. The main area shows a table of assets with columns for 'Monitoring ID', 'Name', 'Internal ID', 'Stock', 'Price', and 'Alert Level'. A green circle highlights the 'Add New Asset' button in the top left of the table. A green arrow points from this button to a dialog box on the right. The dialog box, titled 'Add New Asset', shows a preview of a construction site and fields for 'Asset Name' and 'Asset Type'.

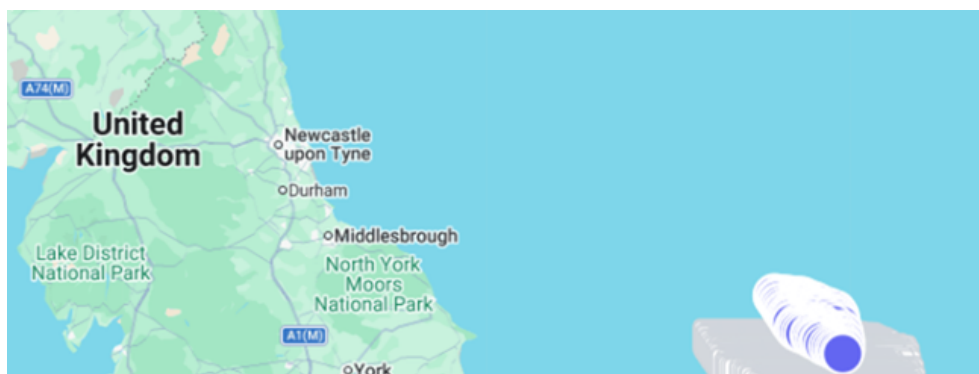


ASSET MAPS

The 'Asset Maps', are another interactive way of navigating the module.

Criteria can also be set on each Module's map, showing a Green, Amber or Red status ring around each asset – in the below left-hand screen shot, showing when all works are completed, if there are outstanding works, or if something has been raised against the asset, such as an Out-of-Date LOLER item, or EHS/NCR raised against it.

Maps can be used for overall layout of the plant, or even to map out stores' locations per part, showing the location of a specific unit in a Warehouse Plan relating to the position entered for the part/tool/spare that is chosen.





FORMS, FIELDS, RULES

The Data Entry into the OPT is completed via forms per module, to update 'Assets' in the System.

The forms are calibrated to align with the content columns in the asset, and update the required fields upon submission. With use of an Asset QR, this again supplies the user with selection of data, which can also carry automation rules. Below is an explanation to each area relating to data input:

INTRODUCTION



Forms

Allowing the data entry from any level in the organisation, depending on requirements to enter. Select the appropriate form from the list in the asset. Completed forms are also stored against the Asset.



Fields

Fields allow specific data to be captured within a chosen field within the Asset that is being updated - This connection is integrated within the form.



Rules

Rules allow smart integration and automation to carry out tasks such as fill out another field based on the one being updated - Saving time, and process for the user and the data responsible reviewing the data.



Granular Permissions

Granular permissions can allow or limit the specific user's access to certain areas and forms to be completed. This may be on role, or to limit external companies from access to other data fields that aren't required for them. Also, permissions can be added in here - Such as approval steps on documents.



MOBTAG & PODIUM



Mobtag are our close partner, and through our linked partnership, provides the framework structure of the system implemented by Podium Energy Consultancy.

The team and developers have worked with Podium and built within the Sub-Domain of Podium Energy, the coding and tools to allow the OPT to gather the momentum and use cases seen today.

During the past two years of Mobtag, they have built extensive use of their system with clients in the asset management system, some of which industries are listed below:

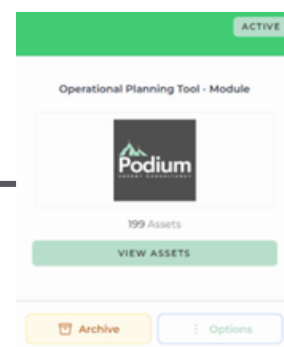
- A leading global commercial real estate and facilities management provider
- A major UK-based facilities management and professional services company
- A multinational workplace and facilities services organisation
- A global diversified chemicals and advanced materials manufacturer

PARTNERSHIP





MODULE:



The Operational Planning module allows for operational planning of the next days works, including but not limited to:

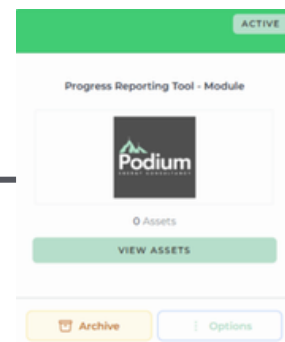
- Toolbox Talks
- Set to Work Briefs
- Parts and Materials selection for task / team specific works
- Operational Planning between assets, knowledge around location to be visited
- Planning of team times, setting to work and means of Transport

OPERATIONAL PLANNING





MODULE:

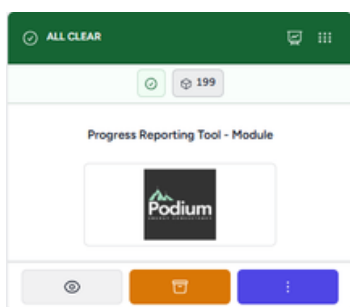


The Progress Reporting Tool module allows for feedback live from the teams out in the field and then updated for the Supervisor to add final touches for anything recorded by the teams.

Some points covered are:

- Time from/to asset
- Works completed
- EHS/NCR Raised – with explanation to issue
- Approval workflow for multiple person sign off for DPR's.

PROGRESS REPORTING



Daily Progress Report Form

Form Submission Report

Podium

Daily Progress Report - Scope

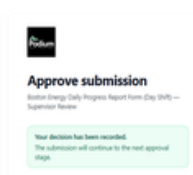
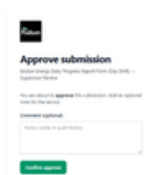
F-00x

Date of Works Completed:

Shift Related Weather Data

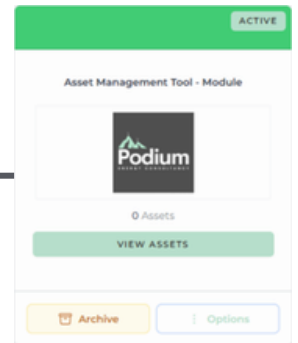
Team 1 Daily Progress:

Team 2 Daily Progress:





MODULE:

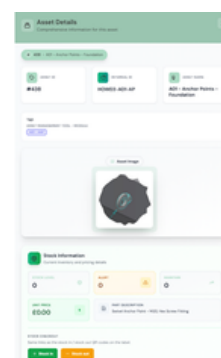
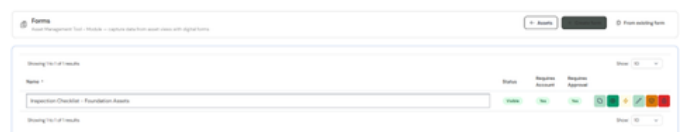
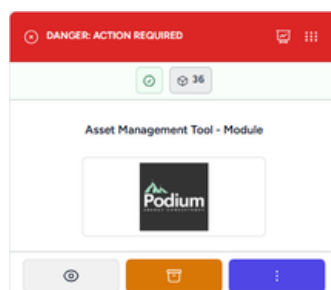


The Asset Management Tool module allows for tracking the ancillary items out in the field, such as anchor points, safety critical items, and providing an overview of the information with markers of expiries or issues on asset.

Some points covered are:

- Inspection Dates
- Linked to Spares Module (if required)
- Overview of asset integral components, even down to items that may require maintenance separate from the overall asset interface

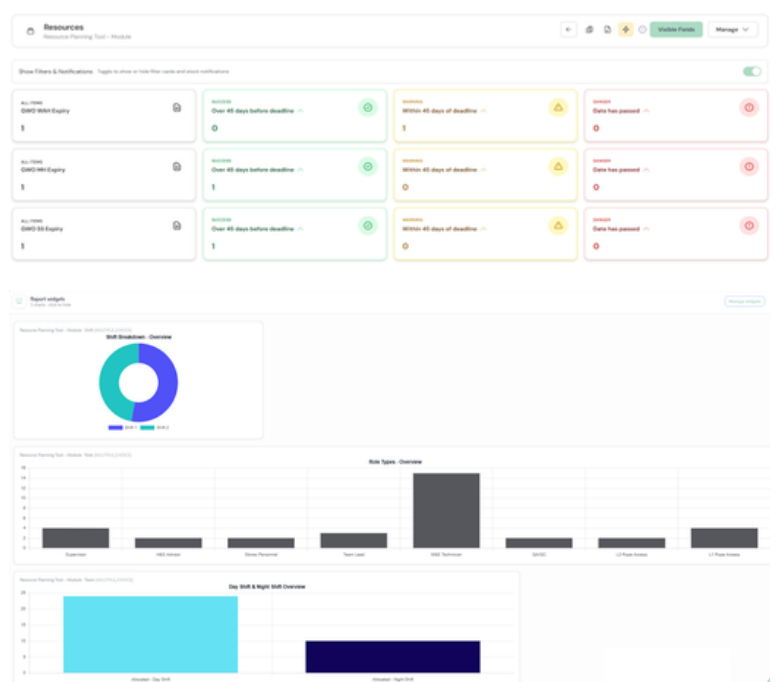
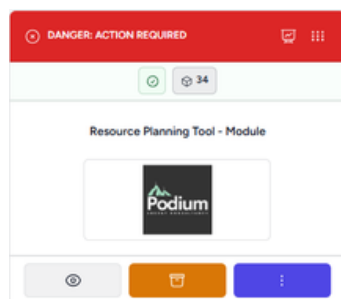
ASSET MANAGEMENT



Some points covered are:

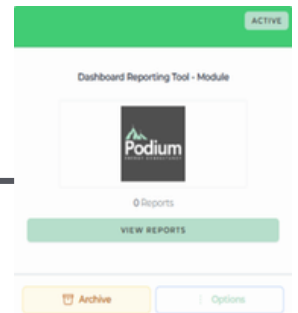
- Personnel Profile
- Certificate Expiry
- Training Requirements
- Assignment to Site
- Dashboard Overview

RESOURCE MANAGEMENT





MODULE:

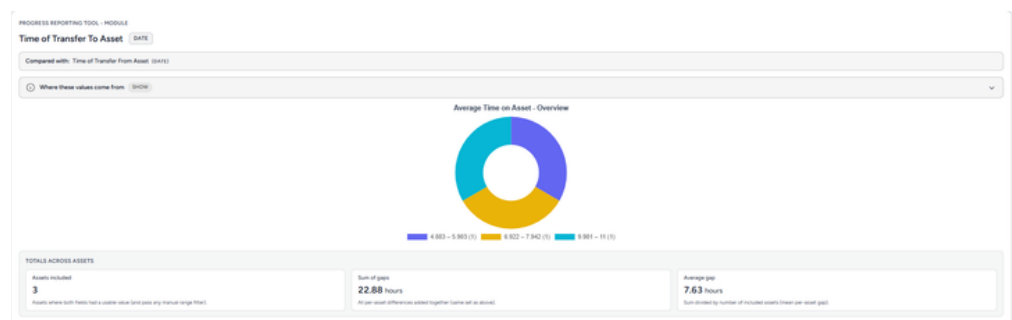


The Dashboard Reporting module is developed for each client specifically, to show statuses across the modules being used by a client.

This will be an area where data sets can be filtered to ascertain data and charts pivoted to client specification, in terms of daily, weekly, and monthly reports, or overall project lifespan.

Some points covered are:

- Completion of overall project
- Usage of items
- Pivoting of Data linked from other Modules to provide user with reporting metric changeability
- Personnel utilisation
- Trends relating to spares, ancillary items – Spot a serial defect or batch defect earlier
- Hours worked across project and on scopes
- Averages – Such as visits required per asset



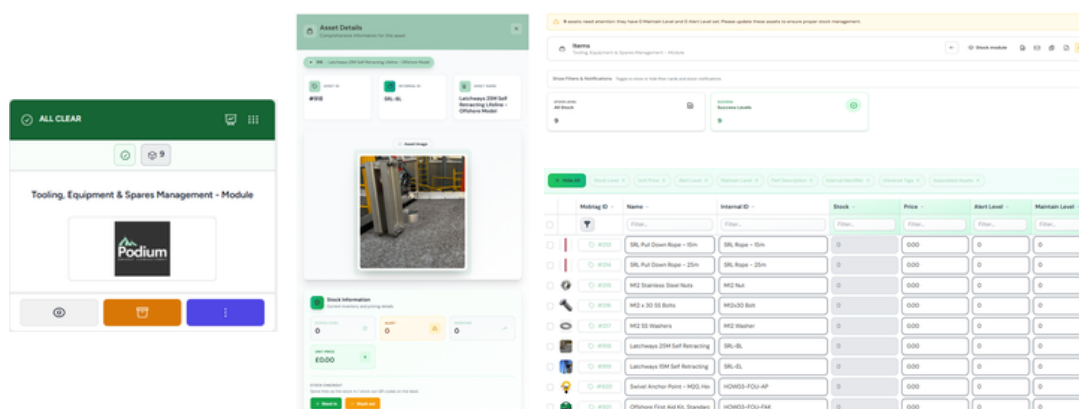
DASHBOARD REPORTING



Some points covered are:

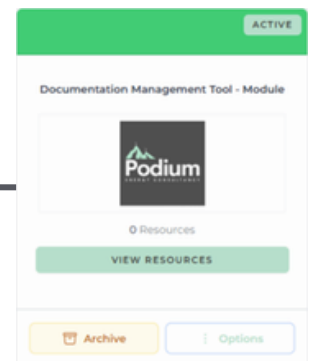
- Goods in / Goods Out
- Dashboard Overview ribbon to show stock levels
- Setting of minimum quantities
- Overview of different storage locations
- Stock Locations
- Batch Traceability

STOCK MANAGEMENT





MODULE:

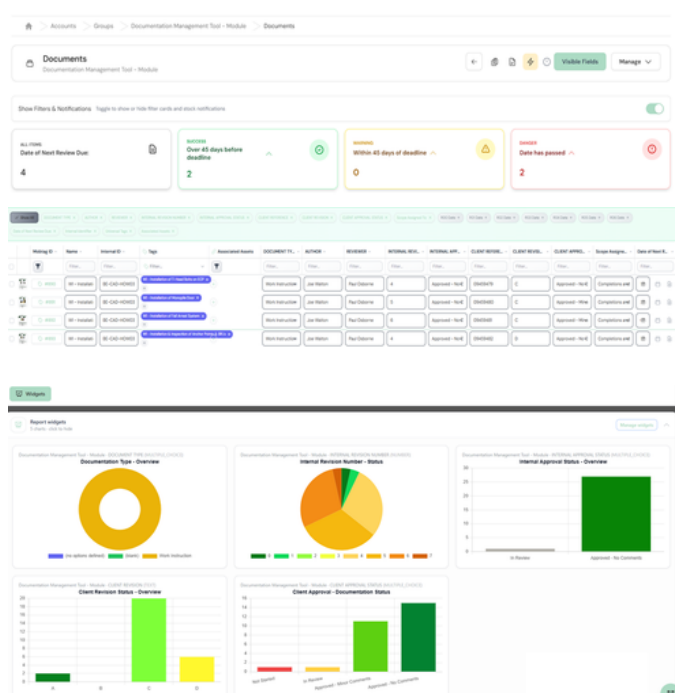
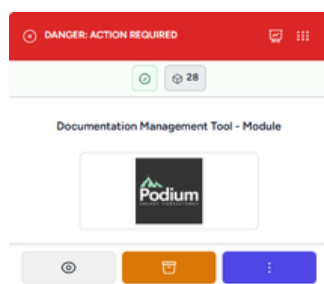


The Documentation Management module allows for tracking of Documentation in a 'Master Document Register' style format, which can track multiple approval items and statuses.

Some points covered are:

- QR Code per Document – Scan the QR and update the MDR live
- QR Can be embedded in the document within a 'Doc Control' section, and links to it's shared storage location to update the document can be done
- Revision Dates and Annual / cyclical revision due dates can be managed and seen in Dashboard.

DOCUMENT MANAGEMENT





CYBER SECURITY CRITERIA

CYBER-SECURITY

Cyber Security & Protection (ISO/IEC 27001 Aligned):

End Point Detection & Response (EDR):

Continuous monitoring and rapid response to endpoint threats.

'Pen Tested' (Penetration Testing):

Regular independent testing to identify and remediate vulnerabilities.

Standards/Alignment with ISO 17025:

Security testing and assurance with ISO/IEC 17025

Data Encryption within System:

All data encrypted at rest and in transit using industry-recognised standards.

"A layered, risk-based security approach supporting ISO/IEC 27001 compliance and protecting the confidentiality, integrity, and availability of information."





USERS:

User permissions per role are set within the system when inviting individuals to use the Operational Planning Tool.

This is done by Podium Energy Admin, with guidance from the Clients input dependant on role.

As seen in the examples, the 'Modules', and the 'Fields' within the modules can be adjusted per individual or role, to hide, allow view, allow editing of each individual data set.

USER PERMISSIONS

Group: Operational Planning Tool - Module Editable ☐ Apply to all fields

Hide Fields

Field: Latitude Hidden

Field: Longitude Hidden

Permissions Manage user permissions

Account: Podium Energy Consultancy Viewable ☐ Apply to all groups

Group: Resource Planning Tool - Module Editable ☐ Apply to all fields

Hide Fields

Field: Role Hidden

Field: Shift Hidden

Field: Team Hidden

Field: WHDA ID Hidden

Field: GWO WAH Expiry Hidden

Field: GWO MH Expiry Hidden

Field: GWO SS Expiry Hidden

Field: GWO First Aid Expiry Hidden

Field: GWO Fire Axc. Expiry Hidden

Field: Email Address Hidden

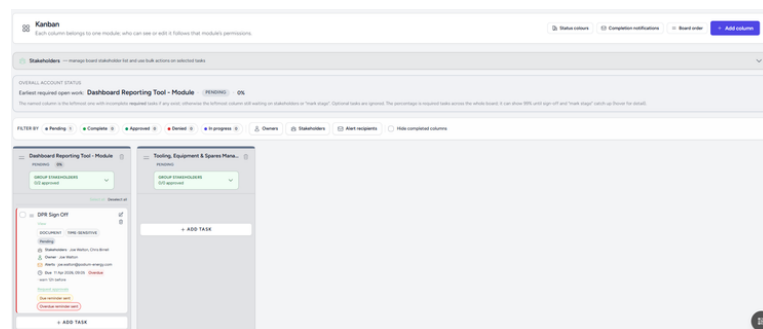


NEW FEATURES:

Kanban Feature:

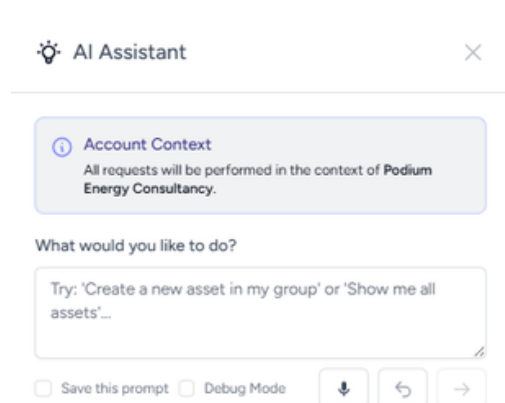
The Kanban feature can be used within the OPT to assign tasks, track progress and monitor topics, along with notifications within the system, to alleviate having other tools to track progress:

- Assign tasks within your team
- Upload documents to the Board
- Sign off Documentation
- Each Module has its own Kanban area in the board



AI Feature:

- Export assets
- Report Generation
- Asset Creation
- Item updates
- Get filtered exports



IMPLEMENTATIONS

A photograph of an offshore wind turbine in the ocean at sunset or sunrise. The sky is a mix of orange, yellow, and grey. A red support vessel is visible on the left side of the frame. A large, dark grey diagonal shape covers the right half of the image, serving as a background for the text.

LET'S WORK TOGETHER

+44 7446893895 

www.podium-energy.com 

joe.walton@podium-energy.com 

HQ: Newcastle Upon Tyne, UK 