



Out of Sight, Out of Business

The work you can't see is the work that sinks projects. A field leader's guide to real-time visibility and operational intelligence.



Yesterday's forms can't run today's operation

The most important work you do happens where you can't see it, and a form is still the only proof it happened. Inspections, permits, daily reports, timesheets, change orders: if it happened in the field, a form is how the office finds out. But the form was built to collect information, and your operation now runs on something it was never designed to give you: proof of what actually happened, while there's still time to do something about it.

That's the shift. Modern field forms don't just feed a database; they force structure onto the work and capture hard evidence as it happens. The difference between managing what you can see and getting blindsided by what you can't.

While spreadsheets, workarounds, and paper forms force field crews to adapt data to fit the form, modern field forms that are digital and dynamic force structure onto work. They record reliable evidence from the field, support smarter workflows, and deliver trusted data to leadership in real time.

The real asset forms provide is the ability to trace your field crews' work and create a record of it, along with immutable supporting evidence you can use to back them up. When you replace paper forms and disconnected processes with modern field forms, you get workflows that actually work — without changing the way your people work.



"It's the exact same form they have been using for more than 20 years, but easier for them to complete."

Luis Fernando Robledo Hernandez | Director of High Live Voltage Live Work | Elecnor

Most frontline forms are trying to do **four things at once**

1



Guide the worker

Guide the worker through the correct process

2



Prove the process happened

Prove the process happened (for audit/compliance)

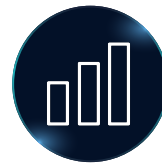
3



Capture exceptions

Capture exceptions when reality breaks the process

4



Generate structured data

Generate structured data for analysis later

But most field form tools fall short. What you need is a solution that does all four things seamlessly, streamlining field workflows and flowing trusted data directly to the core systems your business runs on.



“GoFormz is built for forms. With a lot of other platforms, forms feel like an add-on, almost an afterthought.”

John Walker | IT Manager | Tasman Inc.

Modern forms: not just checking boxes — powering smarter workflows

Whereas traditional, paper-based forms are static information-storage systems, the modern field form is a workflow engine that generates structured data with every submission. When that data flows both ways, with core systems pre-populating forms based on what a tech is doing and where, you lighten the load, protect accuracy, and keep your crews focused on the work that actually needs them. Advanced tools like location tagging, audio recordings, sketches, and photos move you beyond narrative summaries to unlock deeper operational insights

Old form



Human types data

System stores it

Modern field form



Human is guided

System records
behavior, timing,
evidence, exceptions



“It’s really important that everything about GoFormz is automatic. You receive the digital form instantly rather than months later when you’re working with paper forms.”

Mikel Pellitero Espinosa | High Voltage Live Work Technician | Elecnor

Common field forms and their functions

So, what are the processes most companies are using forms to track each day? They cover everything from basic time tracking to complex, multi-step workflows that keep crews safe and ensure regulatory compliance. Let's look at some of the most widely used field forms for multi-site, multi-project enterprise operations spanning the construction, energy, and utilities industries.



Checklists

Checklists are required either before work begins to ensure adherence to safety standards, or once work is completed to document things like equipment usage and quality control.

Common functions:

- “Did you do x?”
- Timestamp + user + sometimes photo
- Skips and “N/A” are extremely informative

Checklists are process-adherence trackers disguised as forms.

- > **Petrol Services Australia implemented event-triggered automation with GoFormz, automatically routing completed forms, including checklists like the Preventative Maintenance Task Sheet, to corresponding emails and systems upon completion.**

[See Case Study > >](#)

“GoFormz saves us around \$350,000 a year. It has allowed us to get more sales and work, without hiring more people.”

Peter Burton

Systems Analyst | Petrol Services Australia



Compliance/safety forms

One of the most important types of forms across all organizations, compliance and safety form workflows protect your people, prevent accidents, and reduce the risk of regulatory fines. Common examples include JSA/JHA, permits and permit-to-work systems, and safety observations/behavioral audits.

Frequent functions:

- PPE check
- Equipment check
- Environment check

Often required by regulation, but incredibly useful for ops insight.

- > **Bozzuto Construction uses GoFormz to share hot work and confined space forms with subcontractors digitally for on-site completion, automatically triggering an approval workflow and updating Procore.**

[See Case Study > >](#)

“We’re definitely saving time with GoFormz because it reduces user error and helps to prevent things from getting filed incorrectly.”

Tamara Kaye

Application Specialist | Bozzuto



Inspections

Field services, facilities, and logistics operations carry out various inspection workflows every day, delivering records that hold up under scrutiny and ensuring quality. Inspections routinely cover equipment, vehicles, assets, sites, and facilities, as well as defect tracking and environmental and compliance requirements.

Common functions:

- Condition rating
- Photo documentation
- Note recording
- Pass or fail rating

Inspections create a historical record of physical reality over time.

“Previously, we faced penalties for damages when returning equipment, even if the damage wasn’t our fault. Now, when we rent a vehicle or equipment, we take and save photos at the time of pickup and return.”

Luis Fernando Robledo Hernandez

Director of High Live Voltage Live Work | Elecnor



Work order management forms

When a shift ends or a job wraps, the next crew needs to know exactly where things stand — which work orders are open, what’s been completed, and what still needs attention. Work order management forms carry that context forward, so nothing slips through the cracks between one crew and the next and the operation keeps moving.

Essential data capture:

- What’s done
- What’s pending
- What’s wrong

Work order management forms capture operational continuity.

“When the stakeholder gets our reports, everything they need is already there. There’s no more back-and-forth.”

Meghan McMillen

Director of Weatherization Programs | CHP Energy Solution



Incident/exception reports

When crews record what led to an unexpected event, near miss, or deviation from standard procedures, they’re more likely to be open and honest — which is why these reports are gold. Incident and exception reports provide a wealth of information that operations teams can use to reduce risk by improving conditions and processes.

Common functions:

- “Why couldn’t you complete the task?”
- Dropdown + free text
- Often filled under stress → often very honest

Incident and exception reporting allows field crews to raise a red flag.

- > **The Robert Henry Corporation saves 40+ hours per week by digitally capturing daily field data. With GoFormz, onsite teams can easily add images to incident reports and the back office can access completed forms as soon as they’re submitted.**

[See Case Study >>](#)

“They’re all kept right in GoFormz, so if there is ever any legal activity related to that we have all the documentation right there in the hit report.”

Van Nussbaum

Controller | The Robert Henry Corporation



Daily Reporting

Daily reports are the connective tissue of any field operation. They tell supervisors, project managers, and executives what actually happened across every site and crew:

- Progress tracking by area and phase
- Delay documentation with cause, duration, and impact
- Crew, equipment, and materials per activity
- Supervisor review with approval chain
- Same-day data flow to ERP and project platforms

Modern daily reports go far beyond a written summary. They route automatically to supervisors, aggregate across crews to project-level visibility, and flow directly into systems like Procore and Smartsheet. Capture approvals, rejections, and resubmissions with metadata, creating an approval chain that can't be changed — and holds up under audit and dispute.

Daily reports are only useful if they arrive **before** the decision is already made

Without structured daily reporting, you're managing on a three to five day lag. By the time a problem surfaces, the moment to course-correct has passed.



Atlantic Pipe Services eliminated a two-week billing delay by routing daily field records to customers automatically

[See Case Study > >](#)

"It's much easier to stand behind our work, especially when we have to navigate more difficult billing conversations."

Ryan Clayton | Corporate Systems and Process Manager | Atlantic Pipe Services, LLC

The Bottom Line

Modern forms do way more than **capture field data.**

Every operational failure you're likely to have next quarter is already written down in a form somewhere. The delays, the rework, the near misses — your field teams track it all, every day.

The companies that are winning today aren't just the ones collecting better data. **They're the ones acting on it.**

The ah-ha moment: Forms aren't just for compliance. They're your **best source** of operational intelligence about how work actually happens.

Bridge the **Field-Platform** Gap with GoFormz

GoFormz is built for construction and energy companies to connect what happens in the field to the core systems your business runs on — closing the gap your current tools have left open. With built-in Power BI integration and robust reporting, GoFormz turns your daily field data into dynamic operational truth. Power better-structured work and better-informed decisions at every level, from individual projects to your portfolio at large.

When you've outgrown paper forms, spreadsheets, static PDFs, and simple mobile forms tools, what you need is a data capture and field workflow platform that does more. That's GoFormz.

Real-time operations stack

1

Capture at source

Offline-first mobile forms with GPS, photos, and conditional logic, designed for field workers, not office users. GPS coordinates lock at the moment of capture (when a JSA is signed, a photo is uploaded, or an inspection point is set), creating a timestamped, location-stamped record that travels with the form through every downstream system.

➤ Since implementing GoFormz, Elecnor has slashed the time to process locations, photos, and completed work from three to four weeks down to the same day.

[See Case Study > >](#)

2

Surface to operations

Immediate visibility into safety events, inspections, daily reports, and equipment status. No more three- to five-day data lag that leads to operational blind spots, lost revenue opportunities, and misinformed decisions.

“Now, if you ask any manager, they rely on GoFormz. They want the information because it helps them run their operations.”

Ryan Clayton | Corporate Systems and Process Manager | Atlantic Pipe Services, LLC

3

Close to finance

Direct integration with Procore, ServiceMax, SAP, Acumatica, Dynamics 365, and Smartsheet — so the data your crews capture flows directly into the systems your back office runs on, without manual re-entry.

Say good-bye to the manual data re-entry that creates roughly half of procurement errors



Compliance-grade documentation

- ✓ Audit trails prevent OSHA penalties up to \$165,514 per violation
- ✓ IRA prevailing wage documentation throughout 5 to 10 year recapture periods
- ✓ Timestamp + GPS + photo evidence creating defensible records of field reality

"You have to be very confident and very sure of what you're submitting to these regulatory agencies because audits have to come back clean. With GoFormz, we can trust the record."

John Walker | IT Manager | Tasman Inc.



Enterprise integration without enterprise complexity

- ✓ Deploy in weeks, not months, supporting rapid time-to-value
- ✓ No-code workflow builder that operations teams control, not IT
- ✓ Proven integration patterns with platforms companies already use

"GoFormz saves us around \$350,000 a year... it has allowed us to get more sales and work, without hiring more people."

Peter Burton | Systems Analyst | Petrol Services Australia



Ready to close the gap between **enterprise visibility** and field reality?

Let us show you how GoFormz can transform your top field workflows in just 30 days.

[Book a Demo > >](#)