

Data Requirement Checklist

The minimum approved evidence needed to configure the governed operational data layer, operational ontology, and order-lifecycle risk map during a two-week Bray diagnostic.

Prepared for customer leadership discussion

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Source systems → governed operational data layer → PulseIQ operational ontology → risk rules → decision trace → leadership action

CONFIDENTIAL DEMONSTRATION

PulseIQ uses read-only approved extracts and metadata. It does not access proprietary algorithms, native CAD files, or write back to source systems without explicit customer approval. The transaction system remains the system of record. Fabric-first, Databricks-ready, platform-neutral.

Two-Week Bray Diagnostic diagnostic scope

The diagnostic begins with selected Bray-approved read-only extracts and metadata. PulseIQ requires only approved operational extracts — it does not require access to proprietary algorithms, native CAD files, confidential design logic, or write permissions to source systems during diagnostic or pilot.

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1. Customer and order book data

- Customer master (name, tier, strategic account flag)
- Open sales order register (order number, line number, value, currency, promise date)

2. RFQ/quote/CPQ approved outputs

- Approved quote or proposal outputs (value, margin, terms)
- CPQ-generated product configuration summary (approved outputs only — not proprietary sizing logic)

3. Sales order and order-line data

- Order line details (product code, description, quantity, unit price, margin)
- Order status and lifecycle stage (RFQ → Quote → Order → Engineering → Procurement → Production → FAT → Ship → Invoice)

4. Engineering BOM and release data

- BOM reference per order line
- Engineering release status and planned/actual release dates
- Drawing approval status and customer comment status

5. Early material release data

- Early material release items linked to order lines
- Supplier delivery promise dates for long-lead items

6. MRP/planning data

- MRP shortages and exception messages per order line
- Material availability status and next-available-date

7. Procurement and supplier promise data

- Purchase order status for order-line materials
- Supplier name, promise date, actual delivery date, quality status

8. Production/work order data

- Work order number, status (released/in-progress/complete), scheduled dates
- FAT bench allocation and utilisation

9. Inspection/quality hold data

- Inspection status and quality hold indicators per order line
- Non-conformance reports and resolution status

10. Shipment/invoice/cash data

- Shipment status, actual dispatch date, delivery confirmation
- Invoice status and payment collection status

11. Commercial terms, LD and margin exposure

- Customer contract LD terms, LD start date, and current exposure per order line
- Margin leakage threshold and forecast vs baseline variance

12. Owners, approval roles and escalation rules

- Accountable role per lifecycle stage (engineering owner, procurement owner, production owner)
- Escalation thresholds and required human approval gates

13. Historical delay/recovery actions (if available)

- Root cause and recovery action log from past order delays
- Supplier performance history for critical materials

Trust boundary

PulseIQ requires only approved operational extracts and metadata. It does not require access to proprietary CPQ algorithms, native CAD files, confidential design logic, or write permissions to source systems during diagnostic or pilot. ERP/IFS remains the transaction system and system of record.

- No proprietary CPQ sizing algorithms are accessed by PulseIQ.
- No native CAD files or confidential design logic are extracted.
- No write-back to source systems without explicit customer approval.
- Read-only approved extracts and metadata are sufficient for the diagnostic and pilot phases.

Preferred delivery format

- CSV or XLSX exports are sufficient for the diagnostic.
- A data dictionary or field explanation is helpful but not mandatory.
- Read-only, time-bounded access can be used where approved.
- Personal data should be excluded unless explicitly required and approved.

IP boundary

Do not provide native CAD files, proprietary sizing calculations, source code or protected design algorithms. Approved read-only extracts and lifecycle metadata are sufficient. Fabric-first, Databricks-ready, platform-neutral.

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Diagnostic deliverables

- Data landscape review with source system mapping
- KPI alignment against governed operational data layer
- Sample order-lifecycle risk map with decision traces
- Board-ready findings report with evidence traceability