

Work Packaging Must-Haves Checklist

When selecting a Work Packaging solution, using a modern SaaS platform that is purposefully built for construction is an absolute must. It must be user-friendly, drive productivity and be effective. More specifically, does the application support the ability to automate legacy tools and do the following:

Must-Haves Checklist

🕒 Approvals

- ☐ Auto-create necessary reviews by package type, discipline, contract, and status
- ☐ Assign Responsibilities and due dates for submission and approval of key items
- ☐ Restrict approval permissions by role, contract, and user to ensure proper completion
- ☐ Set notifications and auto-create reports to ensure approvals are completed in time

🕒 Status & Workflow

- ☐ Create custom statuses and workflows to drive fit-for-purpose processes and automation
- ☐ Control statuses with rules to ensure process compliance

🕒 Rules of Credit, Progressing, Earned Value

- ☐ Automate work planning, estimating, and tracking – rates of placement can be automatically calculated by estimated hours, work steps, and hours
- ☐ Award credit in discrete portions to more accurately describe progressing

🕒 RFI Tracking

- ☐ Track RFIs throughout their lifecycle and automatically update constraint status on associated packages

🕒 Delay Tracking

- ☐ Track blocking items at the work package level and report on any effects and trends

🕒 Safety Reporting

- ☐ Create a project-level set of behavioral-based safety requirements and perform observations to track compliance
- ☐ Use dashboard reports to target areas that may need intervention
 - by area, discipline, contractor, and more

🕒 Work Package Scoping with or without 3D Models

- ☐ Able to consume 3D models from any engineering authoring tool and on web-based platform
- ☐ 3D visualizations of package status, constraints, material availability, progress & more.



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