



WORK PLANNING AND SCHEDULING

Stay on Task and Within Scope

Any job-based organization knows that the best projects tend to start with the best plans. Without them, resources can be under- or over-allocated, and valuable time can be wasted negotiating scope increases mid-job or inaccurately forecasting scope. DevonWay's Work Planning and Scheduling solution prevents these project killers from happening with a fully integrated platform that takes your job from scheduling resources, to assembling necessary documentation and instructions, to executing the work on mobile devices, and finally to the reporting and alerting functionality that's critical to ensuring jobs stay on task, within scope, and on schedule.

Summary of Benefits

- **Minimize unnecessary repetitive tasks** with template-based task creation as well as support for recurring and non-recurring tasks that ensure common workflows don't have to start their planning from square one
- **Reduce planning mistakes** with support for native document management and scheduling, combined with a hierarchical work breakdown that prevents teams and individuals from moving on to the next task before the required preceding tasks are complete
- **Operate and adjust rapidly** with DevonWay's Work Package solution, a mobile-first work execution tool that allows a plan to be put into action with real-time feedback to interested stakeholders

The screenshot displays the DevonWay Work Package solution interface. At the top, there's a search bar and navigation tabs. The main content area shows a task titled 'WT-2020-0005-002' with a status of 'Planning Review'. The task is assigned to 'Holding Tank' and has a due date of '04-19-2020'. The interface includes sections for 'Planning Reviews', 'Record Information', 'Dates', 'Assignments', and 'Plan'. The 'Planning Reviews' section shows a list of reviews with columns for 'Type', 'Person/Team', 'Closure Notice', and 'Comments'. The 'Record Information' section includes fields for 'Identifier', 'Task Status', 'Work Request', 'Request Type', 'Current Task', and 'Work Order'. The 'Dates' section shows 'Initiated On' and 'Due Date'. The 'Assignments' section lists 'Planner', 'Work Requester', 'Owning Organization', 'Current Assignee', 'Work Requester's Organization', and 'Crew'. The 'Plan' section includes 'Planner Final Review', 'Hazard', 'Davis Bacon', 'Task Priority', and 'Expected Hours'. At the bottom, there's a progress bar with stages: 'Initiate', 'Plan', 'Ready', 'Work', 'Verify', and 'Close'.

Flexible Planning, Scheduling, and Work Execution Tools

Support for recurring and non-recurring tasks creates maximum flexibility by allowing Work Planning and Scheduling to be an extension of what an organization already does, as opposed to trying to fit a square peg into a round hole. And mobile-first work execution capabilities allow a plan to be fully executed within the same system, with real-time data and feedback transmitted to interested stakeholders as tasks are completed.

Key Features

Support for Recurring and Non-Recurring Tasks

Recurring scheduled tasks can be set to auto-generate periodically (for example, every 30 days, 3 months, or 2 years), which significantly reduces Planner workload for recurring and preventive maintenance (PM) tasks. Non-recurring tasks can also easily be created and resource-scheduled by authorized persons.

Template-Based Task Creation

Work tasks can be populated using model or historical work orders. This process copies over all necessary parts, permits, reference materials, procedures, controlled documents, engineering drawings, and any other required dependencies, greatly reducing the amount of time Planners take to fill out a package.

Hierarchical Work Breakdown

Break down large jobs into several smaller, more manageable work tasks for distribution to many workers and/or crews while maintaining a hierarchical relationship to the larger project or task.

Native or Integrated Scheduling

Use the built-in DevonWay Scheduling functionality to assign resources to tasks, set durations, manage specific activity timelines, and track progress; or, integrate with a popular third-party scheduling tool, such as Oracle Primavera.

Fully Managed Work Dependencies

Critical inputs such as required permits or parts needed are fully managed within the Planning solution. Planners can allocate or reserve parts and consumables to confirm they are available and correct before a work task is scheduled to be worked. Planners can also identify what permits are needed to execute the work safely, and initiate the applicable permits for review and approval in advance of the scheduled execution date.

The screenshot displays the DevonWay Scheduling interface. The main task is 'Preventative Maintenance' with a title 'Inspect and repair pump'. The task description includes instructions on performing necessary repairs and ensuring safety. The task is assigned to 'Matt Sacks' and is currently 'Active'. The schedule is set to 'Every 6 Months' with a 'Due Date Basis' of 'End of Month' and a 'Next Due Date' of '11/21/2019'. The task is categorized under 'Maintenance' and 'Task Specific' requirements. The interface also shows a 'Task Documents' section with various PDFs and a 'Task Instructions' section with detailed steps.

The screenshot shows the DevonWay mobile app interface. On the left, there is a sidebar with a list of tasks: '01. Work Order' (1 WO 118471345 DW.pdf), '02. Work Instructions' (4 EH Fluid Instrument Cal DW Short.pdf), '03. Procedures' (5 Setpoint Calibration Sheets DW.pdf, 4 Instrument Maint Proc 0-IMI-200 DW.pdf, FPUM100-Fuel Pump Maintenance.json), '04. Drawings' (7 Elect Schematic DW.pdf, 7 DWG SW Pump CWD DW.pdf, 7 Boiler Feed System Flow Diagram DW...), and '05. Forms' (Bruce Generator Brushgear Inspection..., 10 FME and PJB Active DW.pdf, 6 Ignition Control Permit DW.pdf). The main area displays a task card for 'Water Heater Upgrade' with details: Unit: Unit 02, Work Order: KEET82885, Scheduled Date: 10-10-2019, Location: Aux Pump B, Job Type: Maintenance, Identifier: AWKPK 2019-0041, Crew: C Team, Checked Out To: 0300aaa3-0800-841a-0001-000670740005, Initiated By: Sacks, Matt, Reporting Authority: Demo, and Work Against: Water Heater (Gas). At the bottom, there are buttons for 'CHECK IN', 'FINISH', and 'RETURN UNFINISHED'.

Mobile-First Work Execution

When combined with the DevonWay Mobile Work Package solution, planners can send a completed work task to a crew member, who can then check it out to a mobile device (iOS, Android, or Windows) for execution in the field, even while offline.

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