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COURSE BROCHURE

# Advanced Project Closeout Documentation and EDMS Training Course

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# Advanced Project Closeout Documentation and EDMS Training Course

**Ref:** 242_7602 **Date:** 29 March – 9 April 2027 **Location:** Rome **Fees:** 11100 GBP

Project Closeout Documentation and EDMS is a 2-week advanced training course for project document controllers, handover coordinators and project engineers, in which each participant builds a Project Closeout and Handover Documentation Matrix that lists every closeout deliverable, its owner and its acceptance test. Final payments, warranties and facility start-up now hinge on complete, verifiable closeout packages rather than signatures alone. Jupiter Prime Training delivers this course for experienced project delivery professionals.

## Why Project Closeout Documentation and EDMS Matters Now

Three trends make closeout the riskiest stage for project information. Clients withhold retention money and final certificates until warranties, test results and manuals are complete. Facility managers in hospitals, transport hubs and utilities need structured asset information from day one rather than boxes of binders. Contractors demobilise quickly, so missing records become expensive to recover once site teams leave. Projects that plan closeout documents from the start finish on time and release final payments; those that leave it late face disputes, delayed occupancy and lost warranty claims. The course draws on ISO 19650 for information handover and ISO 15489-1 for keeping project records.

## Who Gains Most from Project Closeout Documentation and EDMS

- Controllers who compile closeout dossiers and final registers in the EDMS
- Coordinators who manage handover between contractors and facility operators
- Engineers who verify as-built drawings, test results and commissioning evidence
- Leads who track punch lists, defects and completion certificates
- Specialists who archive project records after demobilisation

A contractor's project delivery unit gains most when its document controllers, handover coordinator and commissioning engineer attend together and leave sharing one closeout matrix and one acceptance checklist.

## Project Closeout Documentation and EDMS Capabilities

The capabilities run backwards from final acceptance, defining what each closeout document must prove and who signs it.

- Design a closeout matrix listing deliverables, owners, formats and acceptance criteria — the client's project director
- Build closeout dossiers and handover indexes in the EDMS — facility and asset managers
- Test as-built drawings and record models against site conditions — design consultants and site engineers
- Assess punch list status and certificate readiness before handover meetings — the commissioning manager
- Specify warranty, spare parts and training records required for acceptance — operations and maintenance leads
- Communicate archive and demobilisation rules for project records — corporate records and legal teams

## Key Project Closeout Documentation and EDMS Terms

- Closeout dossier — the indexed set of final documents proving a project or system is complete and accepted.
- Punch list — a list of minor defects or incomplete items to be fixed before final acceptance.
- As-built drawing — a drawing revised to show what was actually constructed, including site changes.
- Operations and maintenance manual — the supplier and contractor guidance on operating, servicing and repairing installed equipment.
- Practical completion — the stage when works are complete enough for the client to occupy and use them.
- Defects liability period — the time after completion during which the contractor must correct defects at its own cost.

## Project Closeout Documentation and EDMS Day by Day

## Day 1: Why Closeout Fails and What It Costs

- Closeout in the Project Lifecycle — Planning Documents From Mobilisation
- Common Closeout Failures — Missing Warranties, Manuals and Test Records
- Commercial Stakes — Retention Release, Final Account and Disputes
- ISO 19650 Handover Concepts — Information Requirements and Exchange
- Lessons From Hospital and Rail Projects — Late Occupancy Patterns

## Day 2: Defining Closeout Requirements

- Employer Information Requirements — What the Client Expects at Handover
- Closeout Deliverables Breakdown — By System, Area and Discipline
- Acceptance Criteria for Each Deliverable — Format, Content and Signatures
- Responsibility Matrices — Contractor, Subcontractor and Supplier Duties
- Closeout Clauses in Contracts — Linking Documents to Payment Milestones

## Day 3: Structuring Closeout in the EDMS

- EDMS Folder and Metadata Set-Up for Closeout — System and Asset Fields
- Handover Index Generation — Automated Lists From Metadata
- Status Tracking for Closeout Items — Dashboards for Weekly Meetings
- Supplier Uploads for Warranties and Manuals — Portal Rules
- Final Register Freeze — Locking Superseded and Draft Content

## Day 4: As-Built Drawings and Record Models

- Red-Line Collection From Site Teams — Frequency and Responsibility
- As-Built Verification Surveys — Comparing Drawings With Installed Works
- Record Model Updates — Geometry and Attribute Checks
- Drawing Revision Sign-Off — Consultant Approval Before Issue
- Common As-Built Gaps — Buried Services and Concealed Works

## Day 5: Testing, Commissioning and Completion Evidence

- Inspection and Test Plans — Evidence Required per Activity
- Commissioning Records by System — Witness Sheets and Results
- Punch List Management — Categories, Owners and Closure Proof
- Completion Certificates — Practical, Sectional and Final
- Snagging Walk-Downs With Clients — Recording Agreed Actions

## Day 6: Operations, Maintenance and Asset Information

- Operations and Maintenance Manual Structure — System-Based Volumes
- Asset Registers for Facility Management — Attributes and Locations
- Spare Parts and Consumables Lists — Recommended Stock Levels
- Warranties and Guarantees Register — Start Dates and Claim Routes
- Training Records for Operator Staff — Attendance and Competence Evidence

## Day 7: Handover Meetings and Acceptance

- Handover Readiness Reviews — Checklist Scoring by System
- Client Acceptance Workflows in the EDMS — Comments and Resubmission
- Soft Landings and Aftercare — Supporting Early Operation
- Defects Liability Period Records — Logging and Closing Defects
- Final Account Supporting Documents — Variations and Measurements

## Day 8: Demobilisation and Project Archiving

- Demobilisation Checklist for Records — Site Offices and Shared Drives
- Transfer of Project Records to Corporate Archives — Packaging and Indexing
- Retention of Contract and Claims Files — Protecting Future Disputes
- EDMS Decommissioning or Read-Only Mode — Access After Closeout
- Lessons Learned Capture — Feeding Templates for Next Projects

## Day 9: Measuring and Improving Closeout Performance

- Closeout Key Performance Indicators — Days From Completion to Full Handover
- Closeout Risk Register — Early Warnings and Mitigations
- Supplier Performance on Documentation — Scorecards and Retentions
- Client Feedback on Handover Quality — Survey and Interview Methods
- Standard Closeout Templates — Reuse Across the Project Portfolio

## Day 10: Practising the Project Closeout and Handover Documentation Matrix

- Requirements Drill — Applying Day Two Breakdown to a Hospital Wing
- As-Built and Commissioning Exercise — Applying Day Four and Day Five Checks to a Rail Station
- Asset Information Simulation — Applying Day Six Registers to a Water Utility Plant
- Handover Meeting Role-Play — Testing Readiness Scores and Acceptance Decisions
- Project Closeout and Handover Documentation Matrix — Deliverables, Owners, Formats and Acceptance Tests

## Applying Project Closeout Documentation and EDMS After the Course

- Build a closeout matrix for one active project, assigning every deliverable an owner, format and acceptance test, and present it at the next progress meeting.
- Run a handover readiness review on one completed system, scoring warranties, manuals, as-builts and test records, and log gaps for closure.

## Project Closeout Documentation and EDMS Questions FAQ

### What is project closeout documentation and EDMS and why does it matter now?

Project closeout documentation and EDMS is the planning, compilation and electronic control of the final records that prove a project is complete. It matters now because clients link final payments, warranties and occupancy to complete, verifiable closeout packages.

### Which roles gain most from project closeout documentation and EDMS training?

Project document controllers, handover coordinators and project engineers gain most. Commissioning managers and facility management representatives also benefit from shared acceptance criteria.

### How does a project closeout documentation and EDMS course differ from a document control course?

A project closeout documentation and EDMS course focuses on the final stage: as-builts, manuals, warranties, certificates and acceptance. A document control course covers numbering, revisions and transmittals throughout design and construction.

## What do you bring back from project closeout documentation and EDMS training?

You bring back a closeout matrix listing every deliverable, owner, format and acceptance test. You also return with methods for as-built verification, punch list closure and archiving.

## Project Closeout Documentation and EDMS: The Way Forward

The Project Closeout and Handover Documentation Matrix defines every closeout deliverable, who prepares it, in what format and how it will be accepted. Its first use is agreeing closeout scope with the client before the first system reaches completion, led by the handover coordinator and project director. Revisit it after the first handover meeting, when client comments show which acceptance criteria need tightening.