

Managing Simple Projects

EGW-20-02

Applicability

ARTC Network Wide
SMS

Publication Requirement

Internal / External

Primary Source

PP-157 (3.2)

Document Status

Version #	Date Reviewed	Prepared by	Reviewed by	Endorsed	Approved
1.5	22 Oct 20	Configuration Management Administrator	Configuration Manager	Configuration Manager	General Manager Technical Standards 27/10/2020

Amendment Record

Amendment Version #	Date Reviewed	Clause	Description of Amendment
1.0	03 Sep 13		First Issue of Work Instruction – Supersedes PP-157 Project Management (in part). Minor editorial updates following Safety & Environment Committee Meeting 15/07/2013.
1.1	21 Jan 14		Environmental and Minor Updates. Updates also reviewed and approved by Project Management Steering Committee 21/01/2014.
1.2	18 Dec 14		WHS, Environmental and Minor Updates. Updates also reviewed and approved by Project Management Steering Committee.
1.3	25 Mar 15		Reference document numbers updated & document rebranded
1.4	12 Dec 16	Various	Update numbering on document references
1.5	22 Oct 20	Various	Risk management references updated to incorporate changes

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related to the introduction of the Enterprise Risk Management System. Further clarification of documents related to completion of works added to section 3.14. Inventory requirements clarified, executive position titles, environmental references and document numbers updated.

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1 Introduction

1.1 Purpose

This Work Instruction details the requirements for a project classified as a Simple Project by the relevant Approval Authority.

1.2 Scope

This Work Instruction applies to all ARTC Simple Projects including capital works, major periodical maintenance and other projects.

Projects to be conducted as Complex Projects shall utilise EGW-20-01 Managing Complex Projects.

1.3 Relevant Procedure

This Work Instruction is referenced by the EGP-20-01 Project Management procedure.

1.4 Responsibilities

The Approval Authority is responsible for the implementation of this Work Instruction.

The relevant project personnel as defined in the project organisation chart, or as per the EGW2001T-07 Roles and Responsibilities Allocation Report, are responsible for managing the process.

EGW2001T-07 shall also contain the project delegations, if not documented in the Project Management Plan (PMP).

1.5 Reference Documents

The following documents support this work instruction:

- EGP-20-01 Project Management along with the documents referenced there in.
- ARTC Safety Management System (Project Management process for flowcharts)
- Environmental Management System (EMS) per ARTC Intranet site
- Project Lessons Learnt SharePoint site
- FCA-PR-043 Delegation Policy, Principles and Guidelines (for financial delegations)
- FCA-RG-002 ARTC Expenditure Delegation & Disposal Authority Summary
- FCO-PR-022 Contracts Management – Contracting
- FPR-PR-024 Purchasing Materials Procedure
- FIN-PR-039 BIC Submission Procedure (for guidance on Concept Assessment proposals)
- EGP-03-01 Rail Network Configuration Management
- RSK-PR-001 Risk Management Procedure
- RSK-WI-005 Project Risk Management

- RSK-FM-005 Project Risk Management Plan Template
- FCA-FM-101 Capital Works Financial Closeout Form
- SYS-PR-001 Records Management Procedure
- SMS Process - Manage Accreditation – Variation and Change

1.6 Definitions

All necessary definitions are provided in EGP-20-01 Project Management procedure.

1.7 Work Instruction Owner

The General Manager Technical Standards is the Work Instruction owner and is the initial point of contact for all queries relating to this instruction.

2 Roles and Responsibilities

A successful project has a need for direction, management, control and communication. It is crucial to the success of a Simple Project to establish and maintain an effective organisational structure.

EGP-20-01 sets out that the Approval Authority is generally the Group Executive for the Division undertaking the project. The GE always retains responsibility for the project, however may choose to delegate authority for some or all of the Approval Authority tasks to a General Manager. The General Manager may choose to delegate some or all of the Approval Authority tasks to a Project Delivery Manager, Infrastructure Manager, Delivery Manager or some other manager. All such delegations of authority are to be in writing and available in project records for audit purposes.

2.1 Approval Authority Responsibilities

The Approval Authority is the project's interface with corporate management and provides the overall direction for the project. The Approval Authority will review information provided by the Project Manager and provide direction on the project. The specific responsibilities of the Approval Authority are as follows, and the use of EGP2001T-04 Approval Authority Project Checklist is recommended:

- Determining whether the project is designated as a Simple Project or a Complex Project, as per Section 2.2 of EGP-20-01.
- Determining the project governance arrangements, and which project phases can be combined (if any).
- Appointing the members of the Steering Committee (if applicable).
- Appointing the Project Manager for each project phase (where applicable).
- Where applicable, ensuring that on commencement the Project Manager has reviewed Lessons Learnt reports from earlier projects to apply to the current project.
- Approving each version of the Project Management Plan through the phases of the project and approving the entry into each phase of the project.
- Approving other plans (if not incorporated into the Project Management Plan) such as Project Roles and Responsibilities, Quality Management Plan, Commercial Management

Plan, Safety Management Plan, Inspection and Test Plan, Project Risk Management Plan and Environmental Management Plan.

- Define the requirements of Project Assurance and delegate responsibility for carrying out the assurance audits.
- Understanding and reacting to the risks to the project and ARTC. This can include reporting of particular risks and controls to the Operational Safety and Environment Review Committee (OSERC), and to the Executive Committee as appropriate.
- Ensuring appropriate regulatory approvals are in place.
- Reviewing the outputs from each project phase and authorising the commencement of the next phase (potentially expediting the project schedule by permitting activities in a subsequent phase to be undertaken in parallel with an earlier project phase to reduce project risk).
- Approving changes and variations that are beyond the scope delegated to the Project Manager.
- Approving changes in the project schedule which impact on the completion date
- Determining project reporting requirements, and reviewing such reports to monitor progress, exceptions and to challenge the Project Manager on issues.
- Ensuring that all agreed and required project documentation is completed at the correct stage of project implementation.
- Determining and resolving any conflicts or disputes on the project that cannot be resolved by the Project Manager.
- If necessary assisting the Project Manager in negotiating with external bodies.
- Ensuring that the Lessons Learnt Report is uploaded to the Project Lessons Learnt SharePoint site and readily available for future reference across ARTC.
- Approving the transition of residual risks and controls from the project to the Corporate Risk Register.
- Approving project closure following review of the evidence for closure from the Simple Project Checklist supplied by the Project Manager.
- Documenting decisions made to provide clarity and assist with the audit function.
- Ensuring that the project business case outcomes are compared to the initial business case requirements.

In accordance with EGP-20-01, the Approval Authority may require that a Steering Committee is appointed with a number of management level representatives.

3 Process

The phases of an ARTC project are set out in EGP-20-01 section 2.1. EGP-20-01 allows an Approval Authority to agree in writing to amalgamation of project phases where there is a benefit to ARTC. EGP-20-01 also allows an Approval Authority to agree in writing to bringing tasks forward into earlier phases where such action can reduce risks or enable project schedules to be met. Examples of bringing tasks forward include purchase of long lead time material, land acquisition, gaining rail safety accreditation approvals, and environmental and planning permits. Once a decision has been made about what project phases will be utilised, agreement must be reached between the Project Manager and the Approval Authority regarding which End Stage Reports are required before entry into the next phase of the project. In all cases, a Project Close-Out Report (EGP2001T-02) and a Lessons Learnt Report (EGP2001T-03) are required at the end of Phase 6.

Simple Projects may be administered in various ways as determined by the individual Business Units. These may either consist of dedicated Planning and Delivery departments or individual allocation of projects directly to the Project Managers.

The activities for a simple project listed are the minimum requirements that must be achieved with when carrying out designated Simple Projects. These activities below align with EGW2002T-04 Project Management – Simple Project Checklist. EGW2002T-04 shall be used to document completion of project activities, and to demonstrate project completion to the Project Approval Authority.

A requirement of managing Simple Projects is that the Project Manager shall draft a Project Management Plan (PMP).

The options available to the Approval Authority for the Project Management Plan for a Simple Project or group of simple projects are as follows:

- a. Use EGW2002T-01 Simple Project Management Plan for each project or activity, or
- b. Use EGW2002T-01 Simple Project Management Plan as a Program Management Plan across a program of Projects and Work Activities, and then utilise EGW2002T-03 Simple Project Work Package for each individual project.

The choice of which option to adopt depends on the information needs of the Approval Authority, Project Manager and stakeholders.

The Project Manager is to progressively complete EGW2002T-04 Simple Project Checklist.

3.1 Construction Projects and Principal Contractor

Principal contractor, construction project and PCBU are defined in EGP-20-01 in terms of WHS compliance.

Principal contractor duties are triggered when a project is classified as a construction project for WHS purposes and/or if ARTC decides to engage a PCBU (person conducting a business or undertaking) to discharge those duties as a condition of contract.

Each PCBU has its own safety duty, but the principal contractor duties are additional to those ordinarily imposed on a PCBU.

A PCBU may hold multiple safety duties and multiple PCBU's may hold the same safety duty. However, there can only be one principal contractor for a construction project (at a time).

ARTC may engage a contractor to perform the role of principal contractor (per regulation 293 of the WHS Regulations 2011) in order to have the additional principal contractor duties discharged.

In any event, to be engaged as principal contractor for a construction project, a contractor must be:

- a PCBU;
- authorised by ARTC to have management or control of the workplace; and
- authorised by ARTC to discharge the duties of a principal contractor.

The contract entered into for the project will address the formal requirements of the engagement of a principal contractor. See section 3.4 for further guidance.

3.2 Understand the Project Inputs and Outputs

List the business outcomes the project has to achieve in the PMP, and how the outcomes will be demonstrated. This can be achieved by describing the benefit to the business (either operational or financial) by the completion of the project. This activity ensures that the Project Manager is aware of the impact on the business outcomes of any variations proposed for the project.

List the project inputs and outputs, including training requirements, documentation, drawings and spares, in the Project Management Plan. Include how each output will be tested. Test methods can include inspection, analysis, demonstration and/or testing against requirements.

Prepare the Network Alteration Notice (NAN) and list the project outputs on the Configuration Change List (CCL) per EGP-03-01.

3.3 Phase 3 – Understand What Can Affect Project Delivery

The Project Manager shall determine who the stakeholders (internal and external) are and how those stakeholders' area of responsibility impact on the project. The following areas should be considered:

- Corporate governance – approval requirements.
- Environmental – licences, permits and approvals including Environmental Impact Assessments (EIAs) and Environmental Management Plans (EMPs),
- Legal – compliance with legislation, contracts,
- Safety - Rail Safety accreditation requirements and approvals, safety management system (SMS) arrangements and notification of change requirements, licences and tickets
- Early Market Testing. Expressions of interest, order of magnitude costing. Tender approach.
- Contracts – scope, terms and conditions, bank guarantees, warranty and defect handling, documentation, spares, insurance coverage,
- Procurement, inventory – timely acquisition of equipment required for the project and maintenance support,
- Financial – initial estimates, expenditure profile, variations, accounting treatment and tax,
- Operational – possessions planning, commissioning activities, amendments to RAS, training, documentation,

- Engineering – standards, waivers, type approvals,
- Property – third party requirements, boundary issues including possible acquisitions, council approvals, permits, etc,
- Workplace Health & Safety (WHS) – compliance,
- Communications and external stakeholder issues – community liaison, rail operator communications, regulator notifications and approvals,

Determine how each of the elements identified above will be addressed / achieved, and record this in the Project Management Plan.

3.4 Phase 3 - Establish the Project Budget and Planned Expenditure

The Project Manager shall consider what the project budget requirements are, these include:

- Where applicable, prepare the project proposal and applicable Budget and Investment Committee (BIC) forms for the project evaluation and approval submission.
- If not in the Annual Works Programme (AWP), create a document where all budget estimates and expenditure profiles are held.
- Provide the Management Accountant with the budget and expenditure profile to add to the financial system.
- Project Manager will liaise with the Management Accountant to ensure that the accounting and tax treatment envisaged is consistent with the project scope.

3.5 Phase 3 - Plan the Project activities and resources

The Project Manager shall draft the Project Management Plan (PMP) EGW2002T-01 ensuring the elements of the checklist are considered. The plan shall include:

- Project Scope – detail the agreed scope
- Project Outputs – list the outputs, including training requirements, documentation, drawings and spares, including how each output will be tested
- Work Breakdown Structure (WBS), including test method for each WBS item
- Project Schedule – list the phases with milestone definition, timelines with a work management plan
- Project Budget – detailing summary, estimates, cash flow and cost management plan
- Project Team – defining the roles and responsibilities of available resources or sub-contracts, any required skills or competencies, describe how performance will be measured.
- Safety Management – Address safety requirements using the following documents as a guide where applicable (see also EGP-20-01 Appendix 2 for document web addresses):
 - Safe Design of Structures Code of Practice
 - Construction Work Code of Practice
 - Managing the Work Environment and Facilities Code of Practice

Project Managers are responsible to ensure that Safe Design of Structures and Construction Work requirements are added to the Scope of Work of applicable contracts. Where design of structures or construction work is carried out by ARTC staff, the Project Manager is responsible for ensuring that safety requirements are implemented.

- For construction work over \$250,000.00, the following guidance is provided:
 - EGP2001T-06 WHS Management Plan ARTC Principal Contractor, or
 - EGP2001T-07 WHS Management Plan ARTC not Principal Contractor
 - In planning for the site works, reference should be made to Managing the Work Environment and Facilities Code of Practice:
http://www.safeworkaustralia.gov.au/sites/SWA/about/Publications/Documents/626/Managing_the_Work_Environment_and_Facilities.pdf
 - For further guidance on compliance with WHS Legislation and Regulations, contact the ARTC Corporate Work Health & Safety Manager.
 - Ensure contract covers accreditation.
- Rail Safety – determine and document that appropriate rail safety accreditation is held for the work that will be carried out. Agree and document Safety Management System arrangements for works carried out by contractors. Determine if the change requires a variation to ARTC’s accreditation or whether the decision, event or change requires notification to the rail safety regulator (refer Manage Accreditation – Variation and Change).
- Control and assurance of quality – define what are the quality requirements include (if applicable); Configuration, Internal / External quality, material supply, commissioning, defects / omissions and handover documentation
- Communications and external stakeholder issues – community liaison, rail operators
- Environmental EIA (to identify key risks, licences, permits and approvals) undertaken pre-commencement and contractor EMP reviewed (if required). Site controls set up pre-commencement,
- Contracts – scope, bank guarantees, warranty and defect handling, documentation, spares, insurance coverage, liquidated damages, contract particulars tailored to the project, etc
- Ensure that contract documentation (FCO-PR-022 Contracts Management – Contracting) is compliant with rail safety and WHS requirements; the configuration management requirements and environmental approvals, licences and permits.
- Operational – possessions planning, commissioning activities, training, amendments to RAS, documentation, etc
- Engineering – standards, waivers, type approvals, etc
- Risk management – define a Project Risk Management Plan as per RSK-WI-005. Hazards/risks to be considered by either ARTC (when construction works cost less than \$250,000 or we are the principal contractor) or the relevant principal contractor include:
 - risks associated with excavation works;

- the storage, movement and disposal of construction materials and waste at the workplace;
- the storage at the workplace of plant that is not in use;
- traffic in the vicinity of the workplace that may be affected by the construction work.
- Property – third party requirements
- Project Closeout – detail work handover and acceptance, any outstanding works, contract completion, assurance and verification, lessons learnt.

3.6 Phase 4 - Gain Project Approval

The Project Manager shall submit the documents for approval to the relevant Approval Authority or Steering Committee, these include:

- Ensure the Project Management Plan is signed off by the Project Manager and the Approval Authority.
- Any financial / other submissions are presented to the relevant Approval Authority.

3.7 Phase 4 - Regulator approvals and notifications

Regulators need to be notified of certain changes to railway operations. The Project Manager shall ensure appropriate approvals are gained or notifications are submitted. These may include:

- Rail Safety – If a proposed change is outside the scope and nature of railway operations and conditions specified in ARTC's Notice of Accreditation, ARTC is required to apply to the rail safety regulator for a variation of accreditation. The regulator must approve the variation before the proposed change can commence.
- If the change is within the scope and nature of ARTC's accreditation, ARTC may still need to submit a notification of change. It is a prescribed condition of accreditation that certain decisions, events or changes are notified to the regulator within specified timeframes. These changes do not require approval from the regulator however the change cannot commence until the specified notification period has passed. The regulator can request more information within the notification period and they can advise that a change should not proceed.

Refer to the ARTC SMS process 'Manage Accreditation – Variation and Change' for further guidance.

- Environmental - Prepare any required submissions for the relevant environmental regulator, with guidance from the Environment Manager.

3.8 Phase 5 - Manage the Project in Accordance with the Plan

The Project Manager shall manage the requirements pertaining to the project, these may include:

- If required, select contractors, negotiate contract(s) and execute contract(s). Ensure details of whose rail safety accreditation the work will be carried out under and SMS arrangements are agreed and documented.
- All regulatory approvals, including executed contracts, licences and permits needed before project commencement are in place.

- Actively manage the project so that the outputs from each task in the project schedule meet the project requirements and are delivered on time, on budget, and in a safe manner.
- Retain all appropriate project documents and correspondence in Sharepoint Document Management System.
- Ensure compliance with the ARTC Safety Management System (SMS); safety audits may be undertaken during the course of the project.
- Ensure compliance with the ARTC Environmental Management System (EMS), which may include the applicable EIA and EMP for the project. Ensure key Environmental Procedures are followed which may include Environmental Incident Management, Environmental Inspections, Flora and Fauna Management or Pesticide Use Procedure.
- Ensure compliance with ARTC Configuration Management requirements per EGP-03-01.
- All project key output documents eg: reports, drawings, contract requirements, data, lists, etc, electronic and/or hard-copy are transmitted using an EGP2001F-02 Project - Data Transmittal Form.
- Upload the As-Designed drawings into the Drawing Management System (DMS) as per EGP-04-02 Drawing Management System.

3.9 Phase 5 - Respond to Changes that Impact on the Project

The Project Manager shall manage the changes that may impact the project, these may include:

- Actively review and adjust the scheduled activities to preserve the project outputs and schedule,
- When deviations outside limits become unavoidable, the impact on business outcomes is assessed,
- Consult with Stakeholders and get approval to vary project parameters from the Approval Authority.

3.10 Phase 5 - Deal with Project Risks

The Project Manager shall manage the risks associated with the project, these include:

- Maintain a Project Risk Register within the ERMS in accordance with RSK-WI-005 and assess and control risks which could occur whilst the project is running; risks that could arise once the project is completed; and the risks to project success (cost, schedule, quality of outputs),
- Conduct environmental site inspections in accordance with ENV-PR-005 Environmental Site Inspection Procedure. Following an Environmental Incident, report in accordance with COR-PR-012 Reporting Procedure.
- Place risk reviews into the project schedule

3.11 Phase 5 - Report Progress on a Regular Basis

The Project Manager shall communicate requirements to the stakeholders at the agreed reporting intervals, these include:

- Provide written status updates to the Approval Authority and other parties by agreement,
- Track and review costs and explain variations to the relevant authorities.
- Provide updated forecast spend information to Finance.
- Communicate regularly with project team members to enable information to be passed up and down.
- If applicable, at the discretion of the Project Manager, use *EGP2001T-10 Infrastructure Certification and Handover* form to return infrastructure from project control to operations control at the end of each possession period, or at the end of a day's work/shift (using option 1 of sign-off approval)

3.12 Phase 5 - Show That the Project Outputs are Ready to Use

The Project Manager shall ensure that the outputs of the project are ready for handover. These include:

- Verify that the delivered project met its objective, requirements and agreed changes,
- Inspection and Test Plans completed: Signalling ESC-21-01, 02, 03, 04, Track and Civil EGP-20-02. EGP-20-02 Inspection and Test Plans procedure can also be used for ITP guidance for other disciplines,
- Conduct a commissioning activity, (if required),
- Conduct a Practical Completion walkthrough with any contractors and complete the *EGP2001T-13 Certificate of Practical Completion (Contractors)*. This form is signed by the Project Manager and Contractor as evidence that work is completed pending finalisation of minor defects, and should be stored with project records.
- Record the test results for each Work Breakdown Structure (WBS) item,
- Upload As-Commissioned drawings into the DMS and provide the required number of field copies, (if required) into the Drawing Management System (DMS) as per EGP-04-02 Drawing Management System.
- Issue an updated NAN with the final Configuration Change List (CCL) (if required),
- Release the percentage of bank guarantees set out in contract terms (if required).
- Verify regulatory approvals are in place.

3.13 Phase 5 - Deliver Training, Drawings, Manuals and Spares

The project manager shall consider the various project deliverable requirements to the stakeholders, these may include:

- Conduct agreed training of users and maintainers,

- Deliver As-Built Drawings within the ARTC prescribed timeframe, upload them into the Drawing Management System (DMS) as per EGP-04-02 Drawing Management System, and provide the required number of field copies,
- Deliver design reports, user manuals, field documents and spares in agreed quantities & locations.

3.14 Phase 5 - Gain Acceptance of the Project into Use

The Project Manager shall liaise with the stakeholders to ensure acceptance of the project deliverables. These may include:

- Demonstrate to users, operators and maintainers that the project outputs are ready for their use,
- Conduct an infrastructure handover walkthrough with maintenance and complete *EGP2001T-10 Infrastructure Certification and Handover* (using option 3 and/or 4 of sign-off approval) as evidence that the track is certified fit for train running operation, is returned back to maintenance and accepted by the corridor to be under their control. Store the signed form with project records. Note : This form may be used as a template and may be edited to suit the particular requirements of the project / shutdown provided the intent of the original form is maintained.
- Place evidence of user acceptance into project records (eg. SAFE Notice, RAC Notices, Train Notice, IBA, certificate),
- Network Alteration Notice (NAN) to include Inventory in list for notification if applicable.

3.15 Phase 5 - Update Impacted Documents and Systems

The Project Manager shall provide the relevant data in the appropriate format, to update the impacted documents or systems, these include:

- Consult with stakeholders regarding impacted documents and systems, such as the Asset Management System, Drawing Management System and other management systems,
- Ensure that changes to documents and systems are ready to implement when the project outputs enter normal use, and that any ongoing environmental obligations are documented,
- Complete contract administration obligations and notification of start of defect liability period per FCO-PR-022.
- Complete the financial close out form for capitalisation (FCA-FM-101) after each stage of commissioning.

3.16 Phase 5 - Manage Warranty & Defect Liabilities

The Project Manager shall define the responsibilities for any defects or warranties with the stakeholders, these include:

- Assign responsibility for managing warranties where components fail within their warranty period,

- Assign responsibility for managing defects that occur within a contracted defect liability period.

3.17 Phase 6 - Close Down the Project

The Project Manager shall ensure that the project requirements are all closed out, these include:

- Close all project contracts and finalise bank guarantees, insurance bonds or retentions at the end of the defect liability period,
- Finalise all project registers (correspondence, documentation, drawings, risks, assets, finance),
- Compile a report using EGP2001T-03 Lessons Learnt Report detailing any lessons that can be usefully applied to other projects within ARTC. Upload the lessons learnt into the Project Management Lesson Learnt SharePoint Site.
- Transfer residual risks and controls to an appropriate Risk Owner and risk register within the ERMS.
- Ensure that the EGW2002T-04 Simple Project Checklist is complete and presented to the Project Approval Authority to demonstrate that the project is complete.
- Complete EGP2001T-02 Project Close-out Report to the Approval Authority (if required by the Approval Authority), including lessons learnt and the extent to which the business objectives were achieved, Include an Environmental Close-Out section discussing how environmental approvals, licences and permits are met and environmental risks were managed and controlled.
- In consultation with the Geospatial Information Officer (Assets) & Environment Advisor, transfer GIS data sets to the ARTC environmental layers.
- Archive project documentation per ARTC Records Management requirements detailed in SYS-PR-001 Records Management Procedure.