ENGINEERING HANDOVER REVIEW / ILLUSTRATIVE CASE

Does the maintenance team have the records it will need?

The management decision

Check that the latest relevant documents are present before closing the supplier’s handover. A high file count can conceal missing manuals for the equipment actually installed.

When a project closes, delivered manuals and drawings may cover older equipment versions or leave gaps that only become obvious when a part fails. Finding those gaps while suppliers and the project team are still available can shorten the follow-up and give maintenance teams a clearer starting point. It also helps the project sponsor distinguish an outstanding supplier item from a record the site team can update itself.

Worked example

Sixty records are required. Fifty-five files arrive, but four are out of date for the equipment being handed over. Only 51 pass the initial version check, leaving nine that need follow-up.

Example figure	What it represents
60	Required records
55	Files received
51	Current versions

What changes the answer

If two apparently superseded files actually match a different installed version, correct the equipment-to-document mapping before revising the count. Ask maintenance which version it needs to retain.

Engineering handover review

What to commission

Compare the agreed document list for one project handover with the files and revision numbers actually received.

We identify missing records, superseded documents and unclear references, then mark who is best placed to answer each question. The review focuses on the information the team needs to operate or maintain the equipment.

How to judge the result

Each required record is matched to the equipment version, assigned for follow-up or identified as superseded.

Prioritise gaps that affect finding a spare, understanding a change or preparing maintenance. The file review addresses documentation, while site specialists verify physical condition.

Decision worksheet

Project detail	Starting point for your team
Decision owner	Maintenance manager receiving an installation. Name the person who will approve the next step.
Records to gather	The agreed handover list, delivered files and the available drawing and manual registers.
Agreed output	An indexed technical file and a list of version issues and follow-up actions.
Decision date	Record the deadline, any unresolved assumption and who will confirm it.

Discuss this case

Tell us what is being handed over, which team will receive it and when the supplier is due to close out. Highlight any file you have already been unable to locate or use. We can agree where to start even if the file index is incomplete.

Email info@oxetc.co.uk and mention ENG-12. All figures in the worked example are illustrative.