



PPM Document Checklist

Stage selection page

Stage 0
Strategic
definition

Stage 1
Preparation
& brief

Stage 2
Concept
design

Stage 3
Developed
design

Stage 4
Technical
design


Stage 5
Delivery

Stage 6
Hand over &
close out

Stage 7
In use

User Guide

Version 1.0

Fully functional in Adobe  Acrobat only



Project Name:

Project No:

Date:

PM:

Version:

Version Description:

Does this stage apply? If the answer's no please give the reason here

Stage 0
Strategic
definition

Yes

No

Stage 1
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& brief

Yes

No

Stage 2
Concept
design

Yes

No

Stage 3
Developed
design

Yes

No

Stage 4
Technical
design

Yes

No

Stage 5
Delivery

Yes

No

Stage 6
Hand over &
close out

Yes

No

Stage 7
In use

Yes

No



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		Does this process apply	If 'no' please give the reason here	
CENTRAL PLANNING	Folder Set Up	Yes	No	
	Risk Management	Yes	No	
	Schedule	Yes	No	
PROJECT MANAGEMENT	Acceptance	Yes	No	
	Resource Request	Yes	No	
DESIGN MANAGEMENT	BIM	Yes	No	
	Environmental Strategy	Yes	No	
HEALTH & SAFETY	Assessment & Notification	Yes	No	
SECURITY MANAGEMENT	Security Aspects Letter	Yes	No	
	Security Clearance	Yes	No	
	Documentation	Yes	No	
PROCUREMENT MANAGEMENT	Tender Request	Yes	No	



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		Does this process apply	If 'no' please give the reason here	
CENTRAL PLANNING	Start Gate	Yes	No	
	Risk Management	Yes	No	
	Schedule	Yes	No	
	PMP	Yes	No	
	CRAIDDL	Yes	No	
PROJECT MANAGEMENT	Transition Command Approval	Yes	No	
	Project Reporting Approval	Yes	No	
	Resource Request	Yes	No	
DESIGN MANAGEMENT	Stage 1 Report/Study	Yes	No	
	TAG Consultations	Yes	No	
	Peer Review	Yes	No	
	BIM	Yes	No	
	Environmental Strategy	Yes	No	
HEALTH & SAFETY	Assessment & Notification	Yes	No	
	Pre-Construction Information	Yes	No	
SECURITY MANAGEMENT	Security Aspects Letter	Yes	No	
	Lessons Learnt	Yes	No	
	Security Considerations	Yes	No	
	Documentation	Yes	No	
	Personnel Security	Yes	No	
COST MANAGEMENT	Cost Estimate	Yes	No	<hr/> <hr/> <hr/>
	Tender Request	Yes	No	



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		Does this process apply		If 'no' please give the reason here
CENTRAL PLANNING	Closure Gate	Yes	No	
	Risk Management	Yes	No	
	Schedule	Yes	No	
	PMP	Yes	No	
	CRAIDDL	Yes	No	
	Change Control	Yes	No	
	Health Check	Yes	No	
	MS POL Closure	Yes	No	
PROJECT MANAGEMENT	Transition Command Approval	Yes	No	
	Project Reporting Approval	Yes	No	
	Handover Strategy	Yes	No	
	Resource Request	Yes	No	
	Post Project Review	Yes	No	
DESIGN MANAGEMENT	Stage 2 Report/Design	Yes	No	
	TAG Consultation	Yes	No	
	Licenses & Agreements	Yes	No	
	Design Risk Assessments	Yes	No	
	Peer Review	Yes	No	
	BIM	Yes	No	
	Environmental Strategy	Yes	No	
HEALTH & SAFETY	Assessment & Notification	Yes	No	
	Pre-Construction Information	Yes	No	
SECURITY MANAGEMENT	Security Aspects Letter	Yes	No	
	Security Considerations	Yes	No	
	Documentation	Yes	No	
COST MANAGEMENT	Cost Reporting	Yes	No	
	Cost Plan	Yes	No	
	Tender Documents	Yes	No	
PROCUREMENT MANAGEMENT	Preparation of Documents	Yes	No	
	Preparation of Documents	Yes	No	
LOGISTICS	Logistics Strategy	Yes	No	



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	Risk Management	Yes	No	
	Schedule	Yes	No	
	PMP	Yes	No	
	CRAIDDL	Yes	No	
	Change Control	Yes	No	
	Health Check	Yes	No	
	MS POL Closure	Yes	No	
PROJECT MANAGEMENT	Transition Command Approval	Yes	No	
	Project Reporting Approval	Yes	No	
	Handover Strategy	Yes	No	
	Resource Request	Yes	No	
	Post Project Review	Yes	No	
DESIGN MANAGEMENT	Stage 3 Report/Design	Yes	No	
	TAG Consultation	Yes	No	
	Quality Plan	Yes	No	
	Design Risk Assessment	Yes	No	
	Peer Review	Yes	No	
	BIM	Yes	No	
	Environmental Strategy	Yes	No	
HEALTH & SAFETY	Assessment & Notification	Yes	No	
	Pre-Construction Information	Yes	No	
	Construction Phase Plan	Yes	No	
SECURITY MANAGEMENT	Security Aspects Letter	Yes	No	
	Security Clearance	Yes	No	
	Security Considerations	Yes	No	
	Documentation	Yes	No	
COST MANAGEMENT	Cost Reporting	Yes	No	
	Cost Plan	Yes	No	
	Tender Documents	Yes	No	
PROCUREMENT MANAGEMENT	Tender Request	Yes	No	
	Tender Action	Yes	No	
LOGISTICS	Bill of Materials			



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	Risk Management	Yes	No	
	Schedule	Yes	No	
	PMP	Yes	No	
	CRAIDDL	Yes	No	
	Change Control	Yes	No	
	Health Check	Yes	No	
	MS POL Closure	Yes	No	
PROJECT MANAGEMENT	Transition Command Approval	Yes	No	
	Project Reporting Approval	Yes	No	
	Site Handover	Yes	No	
	Handover Strategy	Yes	No	
	Resource Request	Yes	No	
	Post Project Review	Yes	No	
	Stage 4 Report/Design	Yes	No	
DESIGN MANAGEMENT	TAG Consultation	Yes	No	
	Quality Plan	Yes	No	
	Design Risk Assessment	Yes	No	
	Peer Review	Yes	No	
	BIM	Yes	No	
	Environmental Strategy	Yes	No	
HEALTH & SAFETY	Assessment & Notification	Yes	No	
	Pre-Construction Information	Yes	No	
	Construction Phase Plan	Yes	No	
	H&S File	Yes	No	
SECURITY MANAGEMENT	Security Aspects Letter	Yes	No	
	Handling, Delivery & Storage	Yes	No	
	Security Consideration	Yes	No	
	Documentation	Yes	No	
COST MANAGEMENT	Cost Reporting	Yes	No	
	Cost Plan	Yes	No	
	Contract Certificates	Yes	No	
	Tender Documents	Yes	No	
PROCUREMENT MANAGEMENT	Administering Contract	Yes	No	
	Tender Request	Yes	No	
LOGISTICS	Bill of Materials			
	Shipping Materials			



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	Schedule	Yes	No	
	PMP	Yes	No	
	CRAIDDL	Yes	No	
	Change Control	Yes	No	
	Health Check	Yes	No	
	MS POL Closure	Yes	No	
PROJECT MANAGEMENT	Transition Command Approval	Yes	No	
	Project Reporting Approval	Yes	No	
	Site Handover	Yes	No	
	Handover Strategy	Yes	No	
	Resource Request	Yes	No	
	Post Project Review	Yes	No	
DESIGN MANAGEMENT	Stage 5 Record DWGs	Yes	No	
	Record Documents	Yes	No	
	Quality Inspections	Yes	No	
	Peer Review	Yes	No	
	BIM	Yes	No	
	Environmental Strategy	Yes	No	
HEALTH & SAFETY	Assessment & Notification	Yes	No	
	Site Induction	Yes	No	
	Pre-Construction Information	Yes	No	
	Construction Phase Plan	Yes	No	
	Site Monitoring	Yes	No	
	H&S File	Yes	No	
SECURITY MANAGEMENT	Security Aspect Letter	Yes	No	
	Handling, Delivery & Storage	Yes	No	
	Security Clearance	Yes	No	
	Security Considerations	Yes	No	
	Documentation	Yes	No	
	Personnel Security	Yes	No	
COST MANAGEMENT	Cost Reporting	Yes	No	
	Contract Certificates	Yes	No	
PROCUREMENT MANAGEMENT	Administering Contract	Yes	No	
LOGISTICS	Bill of Materials			
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	Schedule	Yes	No	
	PMP	Yes	No	
	CRAIDDL	Yes	No	
	Health Check	Yes	No	
	MS POL Closure	Yes	No	
PROJECT MANAGEMENT	Transition Command Approval	Yes	No	
	Project Reporting Approval	Yes	No	
	Handover Strategy	Yes	No	
	Post Project Review	Yes	No	
DESIGN MANAGEMENT	Record Documents	Yes	No	
	Testing & Commissioning	Yes	No	
	BIM	Yes	No	
	Environmental Strategy	Yes	No	
HEALTH & SAFETY	Building File	Yes	No	
SECURITY MANAGEMENT	Lessons Learnt	Yes	No	
	Documentation	Yes	No	
COST MANAGEMENT	Cost Reporting	Yes	No	
	Contract Certificates	Yes	No	
PROCUREMENT MANAGEMENT	Administering Contract	Yes	No	
	Supplier Feedback	Yes	No	



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CENTRAL PLANNING	Closure Gate	Yes	No	
	Health Check	Yes	No	
	MS POL Closure	Yes	No	
PROJECT MANAGEMENT	Project Reporting Approval	Yes	No	
	Handover Strategy	Yes	No	
	Post Project Review	Yes	No	
DESIGN MANAGEMENT	Testing & Commissioning	Yes	No	
	BIM	Yes	No	
	Environmental Strategy	Yes	No	
SECURITY MANAGEMENT	Lessons Learnt	Yes	No	
COST MANAGEMENT	Contract Certificates	Yes	No	
PROCUREMENT MANAGEMENT	Administering Contract	Yes	No	