


**Maintenance & Construction Management / Project Toolkit (MS Excel & PowerPoint)**

Workbooks in this maintenance and construction management / project toolkit utilise MS Excel's tabular spreadsheet functionality and maximise use of dropdown lists, cell formulae, row and column grouping, conditional formatting and cursor location highlighting. Comprehensive cell notes and embedded notes re workbook usage are provided. Power Point presentations are provided to support workbooks where practicable and to outline other maintenance, project and construction management concepts and methodology.

MS Excel Workbooks	MS PowerPoint Slideshows / MP4 Videos
<p><b>Asset Maintenance Strategy Development</b></p> <p>Workbook comprises <b>6 worksheets</b> to model maintenance strategy based on RCM, FMEA, FMECA (Qualitative) and RCA principles. Cell and embedded guidance notes based on principles presented in 'SAE JA1012 2002 - A Guide to the Reliability-Centred Maintenance (RCM) Standard' and 'RCM 3: Risk Based Reliability Centred Maintenance, Basson' are included. Columns are grouped for specific focus and to optimise worksheet use.</p> <ul style="list-style-type: none"> <li>• <b>Worksheet #1</b> has a guidance flow chart re methodology and workbook use</li> <li>• <b>Worksheet #2</b> has a functional failure mitigation logic chart</li> <li>• <b>Worksheet #3</b> is used to model and optimise maintenance strategy</li> <li>• <b>Worksheet #4</b> is automated and used to summarise failure mode causes and maintenance actions</li> <li>• <b>Worksheet #5</b> has the risk assessment matrix used in worksheet #3</li> <li>• <b>Worksheet #6</b> has the dropdown lists used in other worksheets</li> </ul>	<p><b>Asset Maintenance Strategy Development</b></p> <p>Presentation comprises <b>10 slides</b> including:</p> <ul style="list-style-type: none"> <li>• <b>4 slides</b> with slide index, introduction, flow chart outlining asset maintenance strategy development process based on RCM, FMEA, FMECA (Qualitative) &amp; RCA principles, flow chart outlining functional failure mitigation decision logic</li> <li>• <b>5 slides</b> with worksheet images</li> <li>• <b>1 slide</b> with an example of an embedded note.</li> </ul>
<p><b>Asset Maintenance Spares &amp; Inventory Needs Analysis</b></p> <p>Workbook comprises <b>6 worksheets</b> to model asset spares and inventory needs.</p> <ul style="list-style-type: none"> <li>• <b>Worksheet #1</b> has an overview of spares-inventory analysis strategy</li> <li>• <b>Worksheet #2</b> has a flow chart outlining asset spare parts and inventory needs analysis</li> <li>• <b>Worksheet #3</b> is used to record parent asset data</li> <li>• <b>Worksheet #4</b> is used to model and optimise spare parts and inventory needs analysis</li> <li>• <b>Worksheet #5</b> has an RFI proforma for obtaining relevant OEM supply chain data</li> <li>• <b>Worksheet #6</b> has the dropdown lists used in other worksheets</li> </ul>	<p><b>Asset Maintenance Spares &amp; Inventory Needs Analysis</b></p> <p>Presentation comprises <b>10 slides</b> including:</p> <ul style="list-style-type: none"> <li>• <b>3 slides</b> with slide index, introduction and strategy for assessment of appropriate spare parts stockholding</li> <li>• <b>2 slides</b> with a continuous, annotated flow chart outlining process for asset spare parts and inventory needs analysis</li> <li>• <b>6 slides</b> with worksheet images.</li> </ul>
<p><b>Maintenance Management Review</b></p> <p>Workbook comprises the following <b>11 worksheets</b> and is a comprehensive tool for reviewing, evaluating and reporting on organisational maintenance effectiveness and performance. Includes supporting info and flow charts for review facilitation.</p> <ul style="list-style-type: none"> <li>• <b>Worksheet #1</b> is a review title page</li> <li>• <b>Worksheet #2</b> has a flow chart outlining the review process</li> <li>• <b>Worksheet #3</b> presents the generic MMAPS maintenance mission</li> <li>• <b>Worksheet #4</b> presents the MMAPS maintenance service delivery model (simplified)</li> <li>• <b>Worksheet #5</b> presents the MMAPS maintenance service delivery model (detailed)</li> <li>• <b>Worksheet #6</b> has a flow chart outlining a typical maintenance work control process</li> <li>• <b>Worksheet #7</b> is used to record observations, gaps perceived by users, comments and scores against review questionnaire items</li> <li>• <b>Worksheet #8</b> is automated and used to record scores against review questionnaire items without observations / comments etc.</li> <li>• <b>Worksheet #9</b> is an automated interface between worksheet #7 and worksheet #10</li> <li>• <b>Worksheet #10</b> presents automated review charts based on worksheet #8 and 9</li> <li>• <b>Worksheet #11</b> presents typical NZ Acts, Regulations and Codes of Practice related to industrial maintenance</li> </ul>	<p><b>Maintenance Management Review</b></p> <p>Presentation comprises <b>15 slides</b> including:</p> <ul style="list-style-type: none"> <li>• <b>6 slides</b> with slide index, review process overview, review process flow chart, MMAPS maintenance mission statement, MMAPS maintenance service delivery model (simplified), MMAPS maintenance service delivery model (detailed)</li> <li>• <b>3 slides</b> showing review questionnaire</li> <li>• <b>2 slides</b> with review form worksheet images</li> <li>• <b>3 slides</b> showing review charts</li> <li>• <b>1 slide</b> showing typical maintenance work control process.</li> </ul> <p>Review questions are based on MMAPS maintenance service delivery model.</p>
<p><b>Bow Tie Risk Analysis</b></p> <p>Workbook comprises <b>2 worksheets</b> for Bow Tie analysis.</p> <ul style="list-style-type: none"> <li>• <b>Worksheet #1</b> is a tabular, Bow Tie risk analysis template for detailing hazard / top event, threats / causes, threat / cause barriers / controls consequences and consequence barriers / controls</li> <li>• <b>Worksheet #2</b> has the dropdown lists used in Worksheet #1</li> </ul>	<p><b>Bow Tie Risk Analysis</b></p> <p>Presentation comprises <b>3 slides</b> including:</p> <ul style="list-style-type: none"> <li>• <b>1 slide</b> with slide index</li> <li>• <b>2 slides</b> with worksheet images.</li> </ul>

MS Excel Workbooks	MS PowerPoint Slideshows / MP4 Videos
<b>Root Cause Analysis &amp; Mitigation (RCAM)</b> Workbook comprises <b>8 worksheets</b> for RCAM. <ul style="list-style-type: none"> <li>• <b>Worksheet #1</b> has a procedural flowchart outlining RCAM process</li> <li>• <b>Worksheet #2</b> has an RCAM and Corrective Action Register template</li> <li>• <b>Worksheet #3</b> has an RCAM Report template</li> <li>• <b>Worksheet #4</b> is a template for Qualitative FTA with 6x6x4 matrix (can be a precursor for other graphics e.g. Visio)</li> <li>• <b>Worksheet #5</b> is an FTA Event Resolution template (can be a precursor for other graphics e.g. Visio)</li> <li>• <b>Worksheet #6</b> is a template for 5-Whys analysis</li> <li>• <b>Worksheet #7</b> is a MMAPS Risk Assessment Matrix</li> <li>• <b>Worksheet #8</b> has an ABS Consulting Root Cause Cue Map</li> <li>• <b>Worksheet #9</b> has the dropdown lists used in this workbook</li> </ul>	<b>Root Cause Analysis &amp; Mitigation (RCAM)</b> Presentation comprises <b>13 slides</b> including: <ul style="list-style-type: none"> <li>• <b>2 slides</b> with slide index and introduction</li> <li>• <b>3 slides</b> with flowchart outlining RCAM process</li> <li>• <b>8 slides</b> with worksheet images</li> </ul>
<b>Project Risk Register &amp; Task Risk Reduction Estimator</b> Workbook comprises <b>3 worksheets</b> for modelling project risk. <ul style="list-style-type: none"> <li>• <b>Worksheet #1</b> is a project risk register used to list project risks and model risk contingencies</li> <li>• <b>Worksheet #2</b> is used to model individual task durations / resource units based on perceived risks</li> <li>• <b>Worksheet #3</b> has the dropdown lists used in other worksheets</li> </ul>	<b>Project Planning &amp; Risk Management</b> Presentation comprises <b>5 slides</b> including: <ul style="list-style-type: none"> <li>• <b>2 slides</b> with slide index and flow chart outlining overall project planning process</li> <li>• <b>3 slides</b> with worksheet images.</li> </ul>
<i>No applicable workbook, presentation exists to outline concepts and methodology.</i>	<b>Outsourced Service Contracts</b> Presentation comprises <b>6 slides</b> including: <ul style="list-style-type: none"> <li>• <b>2 slides</b> with slide index and key hallmarks</li> <li>• <b>4 slides</b> with a flow chart outlining process for developing and establishing outsourced, collaborative service contracts based on win / win</li> </ul>
<i>Refer to MMAPS forms and registers templates</i>	<b>Construction Contract Quality Management in Process Plants</b> Presentation comprises <b>18 slides</b> including: <ul style="list-style-type: none"> <li>• <b>2 slides</b> with slide index and introduction</li> <li>• <b>4 slides</b> with continuous, cross functional flow chart outlining construction contract quality management process</li> <li>• <b>8 slides</b> with functional outlines re CQPs, ITPs, NCRs, completion inspection / punch listing, final inspection and QC documentation</li> <li>• <b>4 slides</b> with ITP, Punch List and NCR forms</li> </ul>
<b>Maintenance / Construction Job Cost Estimator</b> Workbook comprises <b>5 worksheets</b> for maintenance and construction job costing. <ul style="list-style-type: none"> <li>• <b>Worksheet #1</b> is used for job details and has an overall, automated cost summary</li> <li>• <b>Worksheet #2</b> is used to list job activities, allocate labour resources and analyse labour resource costs</li> <li>• <b>Worksheet #3</b> is used to list job spares and materials and analyse their costs</li> <li>• <b>Worksheet #4</b> is used to list job miscellaneous cost items and their suppliers and analyse their costs</li> <li>• <b>Worksheet #5</b> has the dropdown lists used in other worksheets</li> </ul>	<b>Maintenance / Construction Job Cost Estimator</b> Presentation comprises <b>6 slides</b> including: <ul style="list-style-type: none"> <li>• <b>1 slide</b> with slide index</li> <li>• <b>5 slides</b> with worksheet images.</li> </ul>
<b>Equipment Failure Modes-Possible Maintenance Actions Matrix</b> Workbook comprises <b>1 worksheet</b> with a wide range of industrial equipment types, equipment failure groups specific to equipment type, potential failure points / modes within each equipment failure group and ability to easily select possible maintenance actions for each potential failure point / mode. Filtering by equipment type and equipment failure group enables appropriate focus. <i>This workbook is being finalised and will be available soon</i>	<b>Equipment Failure Modes-Possible Maintenance Actions Matrix</b> Presentation comprises <b>2 slides</b> including: <ul style="list-style-type: none"> <li>• <b>1 slide</b> - title</li> <li>• <b>1 slide</b> showing worksheet excerpt with failure data for a single equipment type, in this case a screw compressor.</li> </ul>

MS Excel Workbooks	MS PowerPoint Slideshows / MP4 Videos
<p><b>Forms / Registers Templates</b></p> <p>Workbook comprises <b>36 worksheets</b> with an index worksheet and 32 construction / maintenance contract QHSE management form and register templates in individual worksheets. Forms can be extracted individually or in groups as required depending on their end use. Worksheets are individually numbered, the first worksheet being an index with links to respective individual worksheets within the workbook. Where appropriate, some worksheets include drop-down lists and / or formulae.</p>	<p><b>Forms / Registers Templates</b></p> <p>Presentation comprises <b>45 slides</b> including:</p> <ul style="list-style-type: none"> <li>• <b>2 slides</b> with workbook index</li> <li>• <b>43 slides</b> showing specific maintenance / construction management QHSE / equipment form and register templates.</li> </ul>
<p><b>Maintenance / Construction Job Plan(s)</b></p> <p>Workbook comprises <b>16 integrated worksheets</b> for maintenance / construction job planning, execution and reporting bringing all job planning, execution and reporting elements for a specific job together in one place. Data is entered once and data common to multiple worksheets is transferred automatically. These workbooks can be used in isolation or together with a Maintenance Project / Shutdown Planning / Control workbook for multiple jobs as a project.</p> <ul style="list-style-type: none"> <li>• <b>Worksheet #1</b> is used to record job details and has links to other worksheets. Job details are linked to other worksheets and only need to be entered once.</li> <li>• <b>Worksheet #2</b> is used to record all relevant asset details</li> <li>• <b>Worksheet #3</b> is used to record details of relevant job-related documents and provide links to them</li> <li>• <b>Worksheet #4</b> is used to list job activities, allocate labour resources, analyse labour resource costs and includes provision for updating progress</li> <li>• <b>Worksheet #5</b> is used to record additional notes, tools and equipment for each job activity</li> <li>• <b>Worksheet #6</b> is to identify and assess job activity risks / hazards and identify and assess risk / hazard controls</li> <li>• <b>Worksheet #7</b> is an automated job time and cost summary</li> <li>• <b>Worksheet #8</b> is used to list job spares and materials and analyse their costs</li> <li>• <b>Worksheet #9</b> is used to list job miscellaneous cost items and their suppliers and to analyse their costs</li> <li>• <b>Worksheet #10</b> is an Inspection and Test Plan (ITP) template. Multiple ITPs may be required.</li> <li>• <b>Worksheet #11</b> is a Punch List template. Multiple Punch Lists may be required.</li> <li>• <b>Worksheet #12</b> is used job work photos</li> <li>• <b>Worksheet #13</b> is used for job work reporting, either fully or as links to embedded or separate documents</li> <li>• <b>Worksheet #14</b> is used for job supplementary reports, either as scanned images or as links to embedded or separate documents.</li> <li>• <b>Worksheet #15</b> has the risk-hazard matrix-criteria upon which worksheet #6 depends</li> <li>• <b>Worksheet #16</b> has the dropdown lists used in other worksheets</li> </ul>	<p><b>Maintenance / Construction Job Plan(s)</b></p> <p>Presentation comprises <b>19 slides</b> including:</p> <ul style="list-style-type: none"> <li>• <b>2 slides</b> with slide index and introduction</li> <li>• <b>17 slides</b> with worksheet images.</li> </ul>
<p><b>Maintenance Project / Shutdown Planning / Control</b></p> <p>This workbook comprises <b>10 integrated worksheets</b> used to collate / manage multiple maintenance / construction job plans as a project and includes centralised timesheet functionality.</p> <ul style="list-style-type: none"> <li>• <b>Worksheet #1</b> has a project / shutdown preparation flow chart</li> <li>• <b>Worksheet #2</b> has a project / shutdown execution flow chart</li> <li>• <b>Worksheet #3</b> has a project / shutdown planning and control system flow chart</li> <li>• <b>Worksheet #4</b> is used as a project / shutdown overview and includes various asset and job data</li> <li>• <b>Worksheet #5</b> is an automated project / shutdown cost summary</li> <li>• <b>Worksheet #6</b> is an automated project / shutdown timesheet summary</li> <li>• <b>Worksheet #7</b> is used for project / shutdown timesheet data entry</li> <li>• <b>Worksheet #8</b> is an automated summary of project / shutdown resource hours</li> <li>• <b>Worksheet #9</b> can be used to collate spares and materials from respective job plans into an overall project record</li> <li>• <b>Worksheet #10</b> has the dropdown lists used in other worksheets</li> </ul>	<p><b>Maintenance Project / Shutdown Planning / Control</b></p> <p>Presentation comprises <b>12 slides</b> including:</p> <ul style="list-style-type: none"> <li>• <b>5 slides</b> with slide index, introduction, flow chart re project / shutdown preparation, flow chart re project / shutdown execution and management system diagram showing data flows</li> <li>• <b>7 slides</b> with worksheet images.</li> </ul> <p><b>Possible interaction between 'Maintenance / Construction Job Plan(s)' &amp; 'Maintenance Project / Shutdown Planning / Control' workbooks.</b> (Refer to management system diagram in workbook for full detail.)</p> 

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<p><i>No applicable workbook, presentation exists to outline compliance under PECPR Regulations</i></p>	<p><b>Pressure Equipment Cranes &amp; Passenger Ropeways (PECPR) Regulations Management System Requirements</b></p> <p>Presentation comprises 21 slides including:</p> <ul style="list-style-type: none"> <li>• <b>3 slides</b> with title page, slide index and introduction</li> <li>• <b>1 slide</b> with flowchart showing NZ statutes, regulations and codes of practice relating to equipment under PECPR and Pipelines Regulations</li> <li>• <b>1 slide</b> with chart showing NZ regulatory structure and stakeholder interaction</li> <li>• <b>2 slides</b> re Controller's key responsibilities</li> <li>• <b>1 slide</b> re equipment change fundamentals</li> <li>• <b>1 slide</b> re management system basic requirements</li> <li>• <b>2 slides</b> re management systems introduction</li> <li>• <b>1 slide</b> re pressure equipment hazard levels</li> <li>• <b>1 slide</b> re establishment of basic management system</li> <li>• <b>2 slides</b> re pressure equipment compliance strategies</li> <li>• <b>1 slide</b> re crane compliance</li> <li>• <b>2 slides</b> with flowchart showing pressure equipment certification</li> <li>• <b>1 slide</b> with flowchart showing equipment inspection program development</li> <li>• <b>1 slide</b> with flowchart showing equipment repair under PECPR Regs</li> <li>• <b>1 slide</b> with closing comments</li> </ul>
<p><i>No applicable workbook, presentation exists to outline Effective Mentorship.</i></p>	<p><b>Effective Mentorship</b></p> <p>Presentation comprises 17 slides including:</p> <ul style="list-style-type: none"> <li>• <b>1 slide</b> with title page and slide index</li> <li>• <b>1 slide</b> re 'A Guide for Mentors and Mentees'</li> <li>• <b>2 slides</b> re 'Mentorship Session Preparation and Follow-up'</li> <li>• <b>2 slides</b> re 'Setting and Achieving Clear Mentorship Goals'</li> <li>• <b>4 slides</b> re 'Effective Communication in Mentorship'</li> <li>• <b>2 slides</b> re 'Tips for Mentees in Effective Mentorship'</li> <li>• <b>2 slides</b> re 'Benefits of being a Mentor'</li> <li>• <b>2 slides</b> re 'Tips for Mentors in Effective Mentorship'</li> <li>• <b>1 slide</b> re 'Benefits of Being a Mentor'</li> </ul>

# ASSET MAINTENANCE STRATEGY DEVELOPMENT

- Slide 2: Introduction**
- Slide 3: Flow chart outlining asset maintenance strategy development process**
- Slide 4: Flow chart outlining functional failure mitigation logic**
- Slide 5: Worksheet '3. Maintenance Strategy Development' - Outline Groups Closed (*images*)**
- Slides 6&7: Worksheet '3. Maintenance Strategy Development' - Outline Groups (*images, 2 slides*)**
- Slide 8: Worksheet '4. Recommended Maintenance Actions' (*image*)**
- Slide 9: Worksheet '6. Associated Dropdown Lists' (*image*)**
- Slide 10: Examples of Embedded Notes in Worksheet '3. Maintenance Strategy Development'**

# ASSET MAINTENANCE - SPARE PARTS & INVENTORY NEEDS ANALYSIS

**Slide 2: Introduction**

**Slide 3: Strategy for assessment of appropriate spare parts stockholding**

**Slides 4&5: Continuous flow chart outlining asset spare parts and inventory needs analysis process**

**Slide 6: Worksheet '3. Parent Asset Data' (*images*)**

**Slides 7&8: Worksheet '4. Spares-Inventory Analysis' (*images*)**

**Slide 9: Worksheet '5. Proprietary Spares – RFI Pro Forma re OEM Supply Chain (*image*)**

**Slide 10: Worksheet '6. Associated Dropdown Lists (*image*)**

# Maintenance Management Review Process

**Slide 2: Review Process Overview**

**Slide 3: Review Process Flow Chart**

**Slide 4: Maintenance Mission**

**Slide 5: Maintenance Service Delivery Model (Simplified)**

**Slide 6: Maintenance Service Delivery Model (Detailed)**

**Slide 7: Review Questionnaire (1/3)**

**Slide 8: Review Questionnaire (2/3)**

**Slide 9: Review Questionnaire (3/3)**

**Slide 10: Worksheet '7. Review Form-Notes and Scores (Data Entry)' *(image)***

**Slide 11: Worksheet '8. Review Form-Scores (Auto) *(image)***

**Slide 12: Worksheet '10. Review Charts (Auto) (1/3) *(image)***

**Slide 13: Worksheet '10. Review Charts (Auto) (2/3) *(image)***

**Slide 14: Worksheet '10. Review Charts (Auto) (3/3) *(image)***

**Slide 15: Typical Maintenance Work Control Process**

*(Simplified, included for review discussion purposes)*

# **BOW TIE RISK ANALYSIS**

**Slide 2: MMAPS Bow Tie Risk Analysis Worksheet Image**

**Slide 3: Associated Dropdown Lists**

# ROOT CAUSE ANALYSIS & MITIGATION (RCAM)

**Slide 2:** Introduction

**Slides 3,4,5:** RCAM Procedural Flowchart

**Slide 6:** RCAM & Corrective Action Register *(image)*

**Slide 7:** RCAM Report Template *(image)*

**Slide 8:** Worksheet '4. Qualitative FTA 6x6x4 Matrix' *(image)*

**Slide 9:** Worksheet '5 FTA Event Resolution' *(image)*

**Slide 10:** Worksheet '6. 5-Whys Analysis' *(image)*

**Slide 11:** Worksheet '7. MMAPS Risk Assessment Matrix' *(image)*

**Slide 12:** Worksheet '8. ABS Consulting Root Cause Cue Map (Mar2015)' *(image)*

**Slide 13:** Worksheet '9. Associated Drop Down Lists' *(image)*

# PROJECT PLANNING & RISK MANAGEMENT

**Slide 2: Overall Project Planning Process Flow Chart**

**Slide 3: Worksheet 2. Project Risk Register (*image*)**

**Slide 4: Worksheet 3. Task Duration Risk Reduction (*image*)**

**Slide 5: Worksheet 4. Task Resource Time Unit Risk Reduction (*image*)**

# OUTSOURCED SERVICE CONTRACTS

**Slide 2: Some key hallmarks of successful outsourced service contracts**

**Slides 3-6: Continuous flow chart outlining all phases of development and establishment of outsourced service contracts**

# **CONSTRUCTION CONTRACT QUALITY MANAGEMENT IN PROCESS PLANTS - PRINCIPAL ELEMENTS**

**Slide 2: Introduction**

**Slides 3-6: Construction Quality Management Cross  
Functional Process Flow Chart (4 slides)**

**Slide 7: Contract Quality Plan (CQP)**

**Slide 8: Contract Inspection & Test Plans (ITPs)**

**Slide 9: Non-conformance Report / Corrective Action  
Request Process**

**Slide 10: Completion Inspection / Punch Listing;  
Punch Lists;  
Completion Inspection / Punch List Monitoring**

**Slide 11: Completion Inspection / Punch List Categories;  
Partial / Precedential / Sub-system Punch Lists**

**Slide 12: System Punch Lists**

**Slide 13: Final Inspection and Handover to Operations**

**Slide 14: QC Documentation**

**Slide 15: Contract Inspection & Test Plan (ITP) Form**

**Slide 16: ITP Form - Column Description and Use**

**Slide 17: Construction Non-conformance Report /  
Corrective Action Request Form**

**Slide 18: Punch List Form**

# **MAINTENANCE / CONSTRUCTION JOB COST ESTIMATOR**

**Slide 2: Job Details and Cost Summary (Worksheet image)**

**Slide 3: Job Activities and Resources (Worksheet image)**

**Slide 4: Job Spares and Materials (Worksheet image)**

**Slide 5: Job Miscellaneous Costs (Worksheet image)**

**Slide 6: Associated Dropdown Lists (Worksheet image)**

# PRINCIPAL EQUIPMENT FAILURE MODES & POSSIBLE MAINTENANCE ACTIONS MATRIX

Slide 2: Principal Equipment Failure Modes and Possible Maintenance Actions Matrix Worksheet

## CONSTRUCTION / MAINTENANCE CONTRACT QHSE MANAGEMENT FORM / REGISTER TEMPLATES - Index Slide 1/2

Form / Reg ID	Form / Register Name <i>Mainly for construction / maintenance contract management</i>	Functional Area	Document Type	File Ext.
1a	Inspection and Test Plan (ITP) Form	Qty Mgt	Form	.xlsx
1b	Inspection and Test Plan Form Notes	Qty Mgt	FormNotes	.xlsx
2	Inspection and Test Plan Register	Qty Mgt	Register	.xlsx
3a	Punch List (PL) Form	Qty Mgt	Form	.xlsx
3b	Punch List Form Notes	Qty Mgt	FormNotes	.xlsx
4	Completion (PL) Register	Qty Mgt	Register	.xlsx
5	Non-Conformance Report (NCR) Form	Qty Mgt	Form	.xlsx
6	Non-Conformance Register	Qty Mgt	Register	.xlsx
7	Site Instruction (SI) Form	Qty Mgt	Form	.xlsx
8	Site Instruction Register	Qty Mgt	Register	.xlsx
9	Variation Order (VO) Form	Qty Mgt	Form	.xlsx
10	Variation Order Register	Qty Mgt	Register	.xlsx
11	Transmittal Form	Qty Mgt	Form	.xlsx
12	Transmittal Register	Qty Mgt	Register	.xlsx
13	Welding Control Sheet with Materials Traceability Form	Qty Mgt	Form	.xlsx
14	Welders Record Sheet with Materials Traceability Form	Qty Mgt	Form	.xlsx
15	Welding Control Sheet without Materials Traceability Form	Qty Mgt	Form	.xlsx
16	Welders Record Sheet without Materials Traceability Form	Qty Mgt	Form	.xlsx
17	Project Risk Register	Proj Mgt	Register	.xlsm
18	Job Risk-Hazard Analysis Form	HSE Mgt	Form	.xlsx

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## CONSTRUCTION / MAINTENANCE CONTRACT QHSE MANAGEMENT FORM / REGISTER TEMPLATES - Index Slide 2/2

Form / Reg ID	Form / Register Name <i>Mainly for construction / maintenance contract management</i>	Functional Area	Document Type	File Ext.
19	Toolbox Meeting Record Form	HSE Mgt	Form	.xlsx
20	Toolbox Meeting Register	HSE Mgt	Register	.xlsx
21	Contract Health and Safety Performance Statistics Report	HSE Mgt	Report	.xlsx
22	Contract Contact List Form	HSE Mgt	Form	.xlsx
23	Site Inspections - All Categories Form	HSE Mgt	Form	.xlsx
24	Site Inspection Register	HSE Mgt	Register	.xlsx
25	Site Inspection Corrective Action Request (CAR) Form	HSE Mgt	Form	.xlsx
26	Site Inspection Corrective Action Request Register	HSE Mgt	Register	.xlsx
27	Site Hazard Register	HSE Mgt	Register	.xlsx
28	Hazardous Substance Register	HSE Mgt	Register	.xlsx
29	Notifiable Works Register	HSE Mgt	Register	.xlsx
30	Incident-Accident Register	HSE Mgt	Register	.xlsx
31	Event Investigation Register	HSE Mgt	Register	.xlsx
32	Site Visitors Register	HSE Mgt	Register	.xlsx
33	Worker Competency Register	HSE Mgt	Register	.xlsx
34	Machine Thermal Alignment Form	Equipment	Form	.xlsx
35	Machine Thermal Alignment Form Example	Equipment	Form	.xlsx
36	SWOT Analysis Template	MGT	Form	.xlsx

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# MAINTENANCE / CONSTRUCTION JOB PLAN

Slide 2: Introduction

Slide 3: Worksheet 1. Job Overview *(image)*

Slide 4: Worksheet 2. Job Asset Details *(image)*

Slide 5: Worksheet 3. Job Support Document Links  
*(image)*

Slide 6: Worksheet 4. Job Activities and Resources 1/2  
*(image)*

Slide 7: Worksheet 4. Job Activities and Resources 2/2  
*(image)*

Slide 8: Worksheet 5. Job Notes and Tools *(image)*

Slide 9: Worksheet 6. Job Risk-Hazard Form *(image)*

Slide 10: Worksheet 7. Job Time and Cost Summary  
*(image)*

Slide 11: Worksheet 8. Job Spares and Materials *(image)*

Slide 12: Worksheet 9. Job Miscellaneous Costs *(image)*

Slide 13: Worksheet 10. Inspection and Test Plan Form  
*(image)*

Slide 14: Worksheet 11. Punch List Form *(image)*

Slide 15: Worksheet 12. Job Work Photos *(image)*

Slide 16: Worksheet 13. Job Work Report *(image)*

Slide 17: Worksheet 14. Job Supplementary Reports  
*(image)*

Slide 18: Worksheet 15. Risk-Hazard Criteria *(image)*

Slide 19: Worksheet 16. Associated Dropdown Lists  
*(image)*

# MAINTENANCE PROJECT / SHUTDOWN JOB PLANNING / CONTROL

**Slide 2: Introduction**

**Slide 3: Maintenance Project / Shutdown Preparation Flow Chart**

**Slide 4: Maintenance Project / Shutdown Execution Flow Chart**

**Slide 5: Maintenance Project / Shutdown Job Planning & Control System**

**Slide 6: Worksheet '4. Project-SD Overview' (*image*)**

**Slide 7: Worksheet '5. Project-SD Cost Summary' (*images*)**

**Slide 8: Worksheet '7. Project-SD Timesheet Summary' - Basic Worksheet - Outline Groups Closed (*image*)**

**Slide 9: Worksheet '7. Project-SD Timesheet Summary' - Outline Groups Expanded (*images*)**

**Slide 10: Worksheet '8. Project-SD Resources' (*image*)**

**Slide 11: Worksheet '9. Project-SD Spares and Materials' (*image*)**

**Slide 12: Worksheet '10. Associated Dropdown Lists' (*image*)**

# **PRESSURE EQUIPMENT & CRANES LEGISLATION & MANAGEMENT SYSTEM REQUIREMENTS**

- Slide 3: Introduction**
- Slide 4: NZ Statutes, Regulations & Codes of Practice (*Flowchart*)**
- Slide 5: Regulatory Structure & Interaction**
- Slides 6/7: Controller's Responsibilities**
- Slide 8: Equipment Change Fundamentals**
- Slide 9: Management System Basic Requirements**
- Slides 10/11: Management System Introduction**
- Slide 12: Pressure Equipment Hazard Levels – AS 4343**
- Slide 13: Establishment of a Basic Management System**
- Slides 14/15: Pressure Equipment Compliance Strategies**
- Slide 16: Crane Compliance**
- Slides 17/18: Pressure Equipment Certification Requirements (*Flowchart*)**
- Slide 19: Equipment Inspection Program Development (*Flowchart*)**
- Slide 20: Equipment Repair Under PECPR Regs (Simplified) (*Flowchart*)**
- Slide 21: Closing Comments**

# **EFFECTIVE MENTORSHIP**

- Slide 2: A Guide for Mentors and Mentees**
- Slides 3,4: Mentorship Session Preparation & Follow-up**
- Slides 5,6: Setting and Achieving Clear Mentorship Goals**
- Slides 7,8,9,10: Effective Communication in Mentorship**
- Slides 11,12: Tips for Mentees in Effective Mentorship**
- Slides 13,14: Benefits of Being a Mentee**
- Slides 15,16: Tips for Mentors in Effective Mentorship**
- Slide 17: Benefits of Being a Mentor**