What the FM team asks for first

BMS, fire and security

BMS and controls

- Plain-English description of how the controls work
- Points list, named as on the front end
- Time schedules and setpoints as left at handover
- Controls schematics and panel wiring, as built
- Network and IP details for the BMS
- Software version and licence details the client owns
- How-to for the five common FM jobs
- Controls contractor service contact and defects cover

Fire alarm and emergency lighting

- Fire design, installation, commissioning and acceptance certificates
- As-built zone plan for next to the panel
- Cause and effect matrix, including plant, doors, lifts and dampers
- Device list with locations and addresses
- Panel operating instructions and agreed variations
- Weekly test routine and log book for week one
- Emergency lighting completion and commissioning certificates
- As-built layout, test regime and blank log sheets

Security and access control

- System description of how security and access work
- How it links to the fire alarm (door release and overrides)
- As-built drawings with doors, readers and cameras
- How to add, change and remove a user or fob
- CCTV: where recordings are kept, how long, how to export
- Intruder alarm: zones, set and unset, alarm receiving centre
- Door hardware schedules, including fire-alarm release
- Service contacts and defects-period visits

Site tip. Export BMS schedules on the day of handover, put the cause and effect matrix in the fire section, and test fire-alarm door release with the FM team watching.

Logins and passwords

The open manual is for everyone on site. Passwords and codes are restricted information.

- Keep passwords out of the open manual. Use a separate password-protected file, or protected sections in your manual software. State which systems need logins and who holds access.
- Change default passwords. Give credentials to a named person and record the handover.
- Put licence keys and software accounts in the client's name, not your engineer's.

Check the manual works for the FM team

Before handover, check that someone can find these answers in under a minute.

1. How do I change when the heating comes on?
2. What does this fire-panel fault mean, and who do I call?
3. Which devices does the fire alarm shut down or release?
4. How do I add a new starter to access control?
5. Who has the admin logins, and who services each system?

Avoid handover delays

Late or missing handover information can delay sign-off, final payment or retention release.

If any answer takes longer than a minute to find, that's the gap to close before handover.

Sample: `handoverworks.com/sample`
Start free: `handoverworks.com/start`