Information Delivery Manual (IDM)

(COBIE-ER-08) Exchange Project Handover - Asset Transmittal

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(COBIE-ER-07) Exchange Project Handover – Asset Transmittal

NBIMS Development Stage

Stage	Name	Status
0	Draft, not yet approved as NBIMS project	
1	Part of a 'pilot' project	
3	Part of a project out for 'consensus' review	✅

4	Part of an operational standard	
5	Superseded by:	
6	Retired	

Note: For information on the specific stages of NBIMS project development, please visit www.nbims.org.

Project Stage

Stage	Name	Valid
0	Portfolio requirements	
1	Conception of need	
2	Outline feasibility	
3	Substantive feasibility	
4	Outline conceptual design	
5	Full conceptual design	
6	Coordinated design and procurement	
7	Production information	
8	Construction	✅
9	Operation and maintenance	✅
10	Disposal	

Note: While the information exchange described in the COBIE project occurs following construction during building handover, as noted in the table above, the data contained in this particular exchange requirements is generally applicable throughout the facility life-cycle.

Overview

COBIE contains information information describing the operations, maintenance, and assets in capital facilities. The authoritative sources for this information include designers, builders, installers, and manufacturers. On the design side of the exchange, BIM-based design tools may be used to capture COBIE data. From construction, information about approved submittals are included in COBIE exchanges. Builders identify products to be installed. Manufacturers provide operating and maintenance information. Installers provide serial and tag numbers. Quality Control/Assurance staff provide test and certification reports. All these parties can capture building handover data through the COBIE standard, tying their diverse set of software together for the purpose of providing a consistent data set of operations, maintenance, and asset management to building staff.

This exchange requirement defines historical set of transmittal information provided by the builder to the owner or construction manager to demonstrate compliance with contract requirements. The information contained in this exchange requirement links together the construction contractor's supply chain and the owners quality assurance processes. An example scenario for this stage is shown in the table below:

Task	Scenario		
Transmittal Name	Identifies the asset class being considered in the transmittal.		
Transmittal Description	A description of the information being provided		
Transmittal	The date that the owner is	Transmittal	Reference to the unique transmittal number associated with the document. This information

Date	requested to have provided an answer on the transmittal.	Number (Reference)	should be provided to allow BIM data to link-back into business process tools.
Asset Class (Reference)	Reference to the type of material, product, or equipment being submitted.		
Document (Reference)	Reference set of documents associated that provide the information needed to complete the transmittal.		

In addition to the general identification of products in the catalog, the specific components named in the design are also required to be identified. A commonly identified individual components are found in the mechanical system, for example "AHU-1" or "Pump 5". An example scenario for this information is shown in the table below.

Task	Scenario
Component Name	Identifies the type of product that should be installed in the facility.
Register (Reference)	Reference to the product type that contains the overall information about the product.
Space (Reference)	Reference to the lowest leaf(s) of the space hierarchy applicable for the type of product.

The information provided through this information exchange should include:

- All transmittals must be linked to a single asset classes
- Depending on the type of approval type of the asset class, the transmittal date may be constrained.
- Transmittals must link in one or more documents that provide the required information associated with the asset.

The following information auditing is also required for all COBIE file exchanges that occur in a batch file transfer mode. Software that mediates that transmission of COBIE data may capture this data automatically based on process model implementations:

- The party who created the data provided. This is required for individual record.
- The full history of all changes to the data must be included in the data file.

The authoritative source for this information is the construction contractor's supply chain process. Ideally standard transmittal information will be provided directly by product manufacturer's, verified by the contractor and transmitted for processing. Note that the link between submittal documents and the asset catalog links the tradition "construction submittal process" directly to the Building Information Model.

Information Requirements

Context	Information Needed	MAN	REC	OPT	Actor Supplying	Functional Part
Precursor	Product Asset Type must be identified if the associated materials, products, or equipment is a fixed or movable asset.	✅			Designer or Constructor	fp_model_inventory(asset)
Transmittal (Name)	Identify the name of the transmittal.	✅			Constructor or Manufacturer	to be determined
Transmittal (Document)	Identify the list of referenced documents that provide the technical content of the transmittal.	✅			Constructor or Manufacturer	to be determined

Transmittal (Description)	Identify the description of the transmittal.			✅	Constructor or Manufacturer	to be determined
Transmittal (Number)	Identify the external identification number of the transmittal in any external business process tool tracking this transmittal.			✅	Constructor or Manufacturer	to be determined
Authoritative Source	The user responsible for creating the project wrapper data set.	✅			Designer or Constructor	fp_apply_owner_history
History	All versions of information captured during the project will be provided in the file. Superseding data is explicitly identified.	✅			Designer or Constructor	fp_apply_owner_history