Information Delivery Manual (IDM)

(COBIE-ER-13) Exchange Project Handover - Job Plan Constraints

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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5	Superseded by:	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 method by which the constraints upon specific job plans, or job plan tasks are described by the manufacturer and provided to the facility operator/maintainer in the construction-operation information exchange. The information contained in this exchange requirement is commonly created by manufacturers. The information typically flows through the general contractor to the owner as part of exchange of paper handover documents. An example scenario for this stage is shown in the table below:

Task	Scenario
Constraint Name	
Constraint Type	One of Safety, Tools, or Training
Product (Reference)	Identifies the system, product or equipment for which the constraints apply.

| Documents (Reference) | Identifies document containing information about the constraint. |

The COBIE exchange requirements fully recognize the "maturity model" approach to the transformation of information within image-based e-paper documents and meta-data. As manufacturers' begin to embrace the COBIE exchange, COBIE can expand from a documents containing job plans to full data sets that contain job-plans, constraints, and expected task durations. File-based exchange is currently the norm in most manufacturer's literature.

The information provided through this exchange will reflect information provided by the manufacturer or supplier. The data provided here should be appended/changed during construction. Information related to the facility that may be exchanged include:

- Constraint Name
- Constraint Type
- Document(s) containing additional information about the constraint
- Applicable products and/or systems

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 manufacturer. Ultimately the goal is to have a manufacturer to directly provide the information related to the pending material, product, and equipment purchase order.

Information Requirements

Context	Information Needed	MAN	REC	OPT	Actor Supplying	Functional Part
Precursor	Product Name for each material, product, or equipment to be installed in the facility must be identified before it can be associated with specific documents.	✅			Designer or Constructor	fp_model_inventory(asset)
Precursor	Documentation for individual or set of constraints.	✅			Manufacturer	fp_associates_document
Constraint Name	Manufacturer provided name of the constraint (or constraint set).	✅			Manufacturer	to be determined
Constraint Type	Manufacturer provided identifier of constraint type.	✅			Manufacturer	to be determined
Authoritative Source	The user responsible for creating the project wrapper data set.	✅			Constructor or Manufacturer	fp_apply_owner_history
History	All versions of information captured during the project will be provided in the file. Superseding data is explicitly identified.	✅			Constructor or Manufacturer	fp_apply_owner_history