

Information Delivery Manual (IDM)

(COBIE-ER-09) Exchange Project Handover - Asset Documentation

Added by [Bill East](#), last edited by [Bill East](#) on May 02, 2007 ([view change](#))
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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5	Superseded by:	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 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 document-based information will be linked to the construction-operation information. The information contained in this exchange requirement is commonly created by material, product, and equipment manufacturers'. The information typically flows through the general contractor to the owner as part of the quality assurance process. An example scenario for this stage is shown in the table below:

Task	Scenario
Submit Document	Identifies the type of product to which the document is associated.
Document Name	Identifies the "human" description of the contents of the file.
Document Location	Identifies the directory, file name, and file type of the information provided with the COBIE data set.

In addition to the identification of file and location the link between the document and product catalog (i.e. submittal register) is required to be identified. 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 file-based to a meta-data-based exchange of manufacturer data.

The information provided through this information exchange will refine the performance, or other specification, requirements identified by designers. The data provided here should be appended/changed during construction. Information related to the facility that may be exchanged include:

- Electronic copies files of all required construction submittals
- Local copies of all files will be transferred with all referenced files.
- Materials, products, and equipment that require multiple submittal types should have the one separate electronic file for each of the types of submittal requirement. When manufacturers provide a single PDF or paper file, the contractor will break those documents into the components that are to be submitted and that directly apply to the given product.


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)
Document Name	Human-readable file content description	✓			Designer, Constructor, or Manufacturer	fp_associate_document
Document Location (Internal)	File director, name, and type pointing to a local, project-specific reference for the file.	✓			Designer, Constructor, or Manufacturer	fp_associate_document
Document Location (External)	External system name and identification number of the file upon which the current project-specific file was copied.			✓	Manufacturer	fp_associate_document
Authoritative Source	The user responsible for creating the project wrapper data set.	✓			Designer, 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.			Designer, Constructor, or Manufacturer	fp_apply_owner_history
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