Information Delivery Manual (IDM)

(COBIE-ER-10) Exchange Project Handover - Asset Installation

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Labels: (None)

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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5	Superseded by:	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 specific attributes of installed facility assets needed for construction-operation information handover. The information contained in this exchange requirement is a refinement of data already provided by the designer and updated by the contractor. An example scenario for this stage is shown in the table below:

Task	Scenario
Model Number	Identifies manufacturer's model number for the material, product, or equipment installed on the site.
Serial Number	Identifies manufacturer's identification number for the material, product, or equipment installed on the site.
Tag Number	Identifies the 'tag' placed on the product or equipment to assist in rapid identification of the equipment without reference to the serial number.
Product (Reference)	Reference to the specific product or product class being installed.

System (Reference)	Reference to the lowest leaf(s) of the system hierarchy applicable for the type of product.
Space (Reference)	Reference to the lowest leaf(s) of the space hierarchy where the product may be found.

The information provided through this information exchange should be in addition to the designers identification of generic assets, and contractors submittal of more specific assets. This information that already exists in manufacturer's databases. There is currently no automated way to capture this information during construction. Information related to the facility that may be exchanged include:

- Individually named products are installed in the facility and their serial numbers must be documented.
- Types of products or materials are installed in multiple locations in the facility and are documented. This would be important in many materials to capture, for example, dye lots of carpet to enable later product replacement.

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's invoice that accompanied the material, product, or equipment. Ideally the information in this project wrapper will have been created by the manufacturer and provided with the equipment electronically, however, in most cases this information will have to be re-keyed by the construction contractor.

Information Requirements

Context	Information Needed	MAN	REC	OPT	Actor Supplying	Functional Part
Model Number	Model number of a set or specific instance of an installed material, product, or equipment.	✅			Manufacturer or Constructor	fp_model_asset
Serial Number	Serial number of a set or specific instance of an installed material, product, or equipment.	✅			Manufacturer or Constructor	fp_model_asset
Asset, Class (Reference)	A reference to the type of material, product, or equipment previously identified in the building model.		✅		Designer or Constructor	fp_model_inventory(asset)
Asset, Individual (Reference)	A reference to a specific material, product, or equipment previously called out in the building model		✅		Designer or Constructor	fp_model_asset
Authoritative Source	The user responsible for creating the project wrapper data set.	✅			Manufacturer 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.	✅			Manufacturer or Constructor	fp_apply_owner_history