SFT Standard Information Management Plan

Disclaimer

The Standard information management plan (consisting of a Standard information management workbook, appendices, templates and supporting guidance) ("SIMP") has been developed by Scottish Futures Trust (SFT) (authors). The workbook is used to outline the appointing party (ISO 19650-1) (Client- NEC4) information requirements at a project level, and to inform the detailed information deliverables for each lead appointed party (ISO19650-1) (Information Provider – NEC4) at each project information delivery milestone according to BS EN ISO 19650 parts 1 and 2. The workbook is not intended and should not be used as the sole basis for the appointment of lead appointed parties and should be developed in parallel with other appointment documents.

The SIMP is issued so as to be consistent with applicable standards and guidance current as at the date of publication of the SIMP.

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<Project Name>

Standard information management workbook

between

<Appointing Party>

and

<Lead appointed party>

<Date> xx/xx/xxxx

Master document control (Workbook and Appendices)

SFT master workbook reference: SIMP-SFT-XX-XX-WB-Z-0001-S2-P02

Date: June 2020 Contact: <u>bimdeliverygroup@scottishfuturestrust.org.uk</u>



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Project document control (Workbook and Appendices)

Originator: e.g Contracting Authority name

Reviewer: xx Approver: xx

Unique ID (name): per BS EN ISO 19650-2, National Annex
Status Code: per BS EN ISO 19650-2, National Annex

Date of 1st issue:

Project document revision (Codes & Initials)

Status	Revision	Originator	Reviewer	Approver	Date	Description of changes

Content Page Nr.

Templat	·es	Adopted on project ?				
A3	Asset information requirements (COBie)					
A2	Asset information requirements (AIR)					
A1	Project and Exchange information requirements (EIR)					
Append	ices					
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Templat	es	Adopted on project ?
T1	Project Information Protocol	Y/N
T2	Appointing party information container hierarchy	Y/N
T3	Operational and maintenance manual	Y/N
T4	FM data mapping requirement	Y/N
T5	Asset Register	Y/N
T6	Task Information Delivery Plan	Y/N
T7	Master Information Delivery Plan	Y/N

1.0 Project information

(Partial cell auto-fill from front cover)

Project Name	<project name=""></project>
Appointing party (client)	<appointing party=""></appointing>
Appointing party Information Manager	xx e.g. 3rd party xxx
Lead appointed party (LAP)	<lead appointed="" party=""></lead>
LAP Information Manager	xx
Description	xx
Address	xx
Contract type	xx
Adopted Plan of works	<drop down="" select=""></drop>
Project stage commencement	xx e.g. Strategic Business Case/RIBA 0
Project stage end	xx e.g. Operation & Maintenance/RIBA 7

	client) key project n points	Date
RIBA stage 1	1	xx/xx/xxxx
RIBA stage 2	2	xx/xx/xxxx
RIBA stage 3	3	xx/xx/xxxx
RIBA stage 4	4	xx/xx/xxxx
RIBA stage 6	5	xx/xx/xxxx
RIBA stage 7	6	NA

2.0 Glossary of Acronyms

AIM	Asset information model
AIR	Asset information requirements
AMS	Asset management system
BASIR	Built asset security information requirements
BASMP	Built asset security management plan
BEP	BIM execution plan
BIM	Building information modelling
CAFM	Computer-aided facilities management
CDE	Common data environment
COBie	Construction operations building information exchange
EAMS	Estates asset management system
EDMS	Electronic document management system
EIR	Exchange information requirements
FM	Facilities management
IFC	Industry foundation classes
LOD	Level of detail
LOI	Level of information
MIDP	Master information delivery plan
OIR	Organisational information requirements
PIM	Project information model
PIR	Project information requirements
TIDP	Task information delivery plan

3.0 Document scope & purpose

<Project Name> <Date> xx/xx/xxxx

This workbook establishes the appointing party's (client) exchange information requirements (EIR) for each lead appointed party, the project delivery milestones for information planning and delivery, and the project's information standard, production methods and procedures to be adopted by all delivery teams. Refer to BS EN ISO 19650-2, figure 2 which illustrates the relationships and interfaces between project teams and various parties.

This Standard information management plan (SIMP) workbook defines the basis for a lead appointed party to respond to the appointing party with their delivery team BIM execution plan (BEP). A pre-appointment BEP should be developed in accordance with BS EN ISO 19650-2, clause 5.3.2, and updated at appointment stage in accordance with BS EN ISO 19650-2, clause 5.4.1.

The SIMP workbook and its requirements do not relieve or reduce in any way the extent in which each lead appointed party (e.g. contractor, consultant, designer) or each appointed party (e.g. sub-consultants, sub-contractors) shall provide professional services and duties in accordance with their contract agreements. The duty of care and level of skill associated with quality design and information delivery should be overarching and firmly established by the contractual provisions within each appointment.

Other specific project requirements to be incorporated within all appointments are listed below:
[Any exceptions or exclusions must be agreed and contractually documented between the appointing party and each respective lead appointed party]

3.1 Applicable standards & guidance

BIM according to the UK BIM Framework. Baseline standards to be adopted are:

[Any exclusion or deviance from the baseline list should be agreed in advance with the appointing party (client) and documented within lead/ appointed party contracts]

- BS EN ISO 19650-1:2018 Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) Information management using building information modelling, Part 1: Concepts and Principles.
- BS EN ISO 19650-2:2018 Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) Information management using building information modelling, Part 2: Delivery phase of the assets. Including National Annex NA.
- **BS 8536-1:2015** Briefing for design and construction Part 1: Code of practice for facilities management (Buildings infrastructure)
- **BS 8536-2:2016** Briefing for design and construction Part 2: Code of practice for asset management (Linear and geographical infrastructure)
- PAS 1192-3:2014 Specification for information management for the operational phase of construction projects using building information management.
- **BS 1192-4:2014** Collaborative production of information. Fulfilling employer's information exchange requirements using COBie.
- PAS 1192-5:2015 A specification for security-minded building information, modelling, digital built environments and smart asset management.

Reference Standards and Guidance: [review and amend to suit project requirements]

- **BS 8541-1:2012** Library objects for architecture, engineering and construction. Part 1: Identification and classification Code of Practice
- **BS 8541-2:2001** Library objects for architecture, engineering and construction. Recommended 2D symbols of building elements for use in building information modelling
- **BS 8541-3:2012** Library objects for architecture, engineering and construction. Shape and measurement. Code of practice
- **BS 8541-4:2012** Library objects for architecture, engineering and construction. Attributes for specification and assessment. Code of practice.
- BS 7000-4:2013 Design management systems. Part 4. Guide to managing design in construction.
- PAS 1192-6:2018 Specification for collaborative sharing and use of structured Health and Safety information using BIM
- UK BIM Framework, Guidance https://ukbimframework.org/standards-guidance/
- NBS BIM Toolkit Levels of Definition- https://toolkit.thenbs.com/definitions
- NBS BIM Toolkit Uniclass 2015 https://www.thenbs.com/our-tools/uniclass-2015
- SIMP Guidance for workbook population https://bimportal.scottishfuturestrust.org.uk/guidance

3.2 Project Information Protocol

In accordance with BS EN ISO 19650-2, clause 5.1.8 an information protocol should be established at the project outset and subsequently and appropriately incorporated into all project appointments. This includes appointments between the:

- Appointing party (client) and each lead appointed party (e.g. Architect, engineer, PM, or tier one contractor)
- Each lead appointed party and their own appointed parties (e.g. sub-consultant, sub-contractor and any onward supply chain parties)

On this project the below information protocol has been developed for this appointment:

Document name/ reference	Status	Revision
e.g. SchoolB-LA-XX-XX-IP-K-0001	e.g. S2	e.g. P01

[An information protocol template to support the BS EN ISO 19650-2 delivery phase has been published by the UK BIM Framework and available as an optional resource for development into an information protocol for this project. (Refer to SIMP Template T1)

If adopted, appropriate legal and professional advice should be sought to ensure the project information protocol meets the needs of the parties concerned, and their appointments to which English / Scots law applies.]

3.3 Roles & Responsibilities

Project roles and responsibilities shall be assigned to ensure effective management of project information and design coordination.

Information Deliverables: Refer to Appendix A1 for the appointing party information deliverables for each information exchange point.

[This should be completed by the appointing party prior to issue]

Information Management Assignment: Refer to section **7.0** matrix which sets out the project information management functions and party responsibilities.

This is derived from BS EN ISO 19650-2, Annex A.

[The matrix should be reviewed and agreed by all parties before commencement of information management activities for each appointment]

The lead appointed party shall also confirm the names of the individual(s) who will undertake the information management function within the delivery team's BIM Execution Plan.

4.0 Project information standard

<Project Name>
<Date> xx/xx/xxxx

Reference BS EN ISO 19650-2, 5.1.4 this section outlines information standards to be adopted by project delivery team(s)

Item			Description						
4.1 Exchange of	The exchange of information requirements for this project include:								
Information									
	• Formats (refer to section 5.2)								
	Nomenclature: Information container naming, status and revisions codes should be in accordance								
	with BS EN ISO 19650-2: 2018, National Annex. [specific and unique identifier codes should be added								
	below where known at the project outset. A full set of project identifiers and codes should be listed								
	with the BEP and updated as required e.g. when new organisations join the project]								
	• Space / room naming [add naming (or numbering) conventions to be adopted on this project and included within all associated information deliverables]								
		omponent naming [add naming	-	g) conventions	to be adopted o	on this project			
		within all associated information							
					·	•			
	[Add any addi	itional information exchange st	andards requir	ed by the appo	ointing party on	this project]			
4.2 Project co-	The project co	pordinate system should be in	accordance wit	h the Ordnance	e Survey Nation	al Grid			
ordinate system	reference syst	tem, utilising standard easting	and northing g	rid digits.					
		mmencement of any 3D mode	•	=					
		um (OD) should be agreed by t	-	* *					
	be considered	ıld be within the project BIM E	xecution Plan.	The following (or similar table i	ormat snould			
		e survey co-ordinates, project o	o-ordinates an	d OD/ AOD val	ues are known i	nclude in the			
	below table]	e survey of oralliaces, project (o oramates an	a 02, 7.02 va.	des die known	morade in the			
			c:.						
			Site survey	Project 01	Project 02				
		Easting (m)							
		Northing (m)							
		Grid intersection reference	NA						
		Angle to true north (deg)	NA						
		OD (m)		NA	NA				
		AOD (m) (Above)	NA						
4.3 Structuring	Classification	of information within informat	ion containers	should be in ac	ccordance with	Uniclass 2015			
and classification		S EN ISO 19650-2 NA.4.4). As a							
of information		tion container (ideally as metac							
	included / em	bedded in the contents of 3D i	model objects.						
		for COBie delivery: Codes sho	•		ivery per BS 119	2-4:2014,			
	and as noted	in appendix A3 - AIR (COBie), '(comment, colu	mn.					
	Uniclass 2015	Project Management (PM): C	odes should he	adonted for c	assification of i	nformation			
		es. PM codes are used in:	oues should be	adopted for c	18331116811011 01 11	normation			
	appendix A1								
	• templates T								
	Uniclass 2015	Systems (Ss) and Products (Pi	r): Codes shoul	d be adopted a	nd added for as	sets			
	identified in a	ppendix A2 - Asset Information	n Requirements	5.					
	New Rules of	Measurement (NRM):							
	With reference	e to appendix A2: Asset Inforn	nation Requirer	nents, 3D mod	el geometry ass	ociated			
		vork packages will require NRN		eference assigr	nment to facilita	te cost			
1	lostimating on	d cost planning for conital buil	طنمح بينمجاده						

estimating and cost planning for capital building works:

[list all known work packages that apply]

It is expected that the appointed members of the project team will take appropriate measures to ensure reasonable accuracy of modelled information for quantification purposes.

4.4 Level of information need framework

The **level of information need** for project information deliverables (containers) are specified by the appointing party (client) in appendix **A1**. The lead appointed party shall adopt these when establishing the exchange information requirements for each appointed party, and when defining the federation strategy and information container breakdown structure. The agreed level of information need for each information container should be recorded in the Task Information Delivery Plan's (TIDP).

On this project the level of information need framework is specified as follows:

Geometrical information - e.g. 3D model geometry with embedded data, or 2D drawings cut from 3D models. Level of detail (LOD) and level of information (LOI) expressed as a combined value. LOD 5 + LOI 6 (expressed as 5:6) are the maximum combined values that can be specified for any one information container at RIBA stage 6. Further definition on the requirements and industry examples are available on the NBS toolkit website. (Refer to link in section 3.1)

Unless indicated otherwise by the appointing party in appendix A1 the default position for geometrical information deliverables is to contain the level of detail (LOD) and level of information (LOI) equivalent to the plan of work stage when the deliverable takes place. e.g. Stage 3 deliverable = LOD 3 + LOI 3, expressed as 3:3. For COBie delivery, the data requirements set out in appendix A3 shall be included within the LOI value for associated assets and model geometry at RIBA Stages 3, 4 and 6.

Non-geometrical information- e.g. reports, schedules, cost plan. Level of information (LOI) expressed as a single value. e.g. Stage 3 deliverable = LOI 3, expressed as 3.

Unless indicated otherwise by the appointing party in appendix **A1** the default LOI metric for non-geometrical information deliverable is the plan of work stage number when the deliverable takes place. e.g. cost plan at stage 2 = LOI 2, at stage 3 = LOI 3.

[Appointing parties should consider both the purpose of each geometrical and non-geometrical information deliverable, and their information requirements to satisfy the corresponding Project Information Requirement (PIR) (refer to appendix A1) at each exchange stage point]

4.5 CDE and collaboration

The platform to manage the appointing parties project's common data environment (CDE) is noted in section 4.9 below. The project CDE solution and workflow requirements for parties is included within the Project Information Protocol, noted in section 3.2 of this workbook.

[With reference to BS EN ISO 19650-2, 5.1.7, it is highly recommended the project CDE is in place prior to issuing any invitation to tender. This is also applicable if the appointing party (client) intents to appoint a third-party to host, manage or support the project's CDE on their behalf. A functional and non-function specification should be established which includes a strategy for any information transfer(s) between a lead appointed party CDE platform to the appointing party EDMS at project information exchange points. The specification should also include any 3rd party requirements for a period of aftercare, or the archiving of information post project handover.] [Many public sector organisations do not have established CDE platforms and may need to archive information exchange deliverables on their own internal servers or central hard drives pending future procurement of a web-based CDE platform. If the case, there will be a reliance to use the 'client shared area' of a lead appointed party (e.g. a Tier 1 contractor) managed CDE platform, to approve information before hard- transferring information packages to the appointing party (client) for archiving at each project information exchange point. To ensure such information is delivered in a way that is structured, searchable and indexable, each delivery team(s) shall as a minimum adopt the classification and information container hierarchy outlined in template T2. The baseline template T2 should be updated to represent a information container hierarchy required for this project at each information exchange point.]

Details of the collaboration process must be provided in the BEP, including:

- Process of sharing information between delivery team/ task team members
- Quality assurance process and publishing information to the appointing party
- How the EIR and AIR deliverables will be met and tracked
- Process of model coordination and federation strategy
- Frequency of information exchanges for coordination exercises and/or meetings
- Details of information model review workshops and other collaborative working practices e.g. utilisation of 3D model(s) at design team and/or site meetings

The following meeting types, frequencies and dates aligned to key project stages, should be outlined in the BEP:

- Mobilisation/kick-off
- Federation strategy reviews
- Model coordination reviews
- Look ahead, handover and project close out

4.6 Co-ordination and clash avoidance

The delivery teams shall provide details of the spatial coordination process in order to meet the project information standard. The following should be detailed in the BIM Execution Plan:

- Clash avoidance process including:
- o Software
- o Process overview
- o Responsibilities
- o Outputs
- Technical query workflow
- Tolerance strategy
- Coordination resolution process
- How the spatial coordination process aligns with periodical design/ technical reviews, the established federation strategy and the information model(s) review and acceptance process.

4.7 Health & Safety and CDM

[Appointing party should review and amend the following text as required]

The Appointing party expects the utilisation of PAS 1192-6:2018 to support the project H&S/ CDM management process as required under the Construction (Design and Management) Regulations 2015.

[The following is related to PAS1192-6; an optional standard – delete if not applicable]

With reference to PAS1192-6:2018 a H&S risk management strategy will be established across the project lifecycle, with required tasks, responsibilities and information requirements clearly identified and recorded within the BEP for delivery via the project information exchanges. Utilising PAS1192-6:2018, Section 5 guidelines, the supply team shall adopt the 4-element Risk Information Cycle approach to 'Identify, Use, Share and Generalise' project risk and associated information.

[The following is related to integrating H&S information within 3d model geometry – delete if not applicable]

Project H&S information should be integrated in the models, BIM process and applications, thus enabling wider stakeholder engagement and collaboration in relation to optimum design and operational risk identification, mitigation and management.

The integration of H&S and BIM shall enable the output of the Health & Safety file (HSF) as part of the Asset Information Model (AIM) transferred to the Employer or Operator pre project handover. It is recommended H&S risk information is exchanged across the project using COBie, an non-proprietary data format. When using COBie to capture and exchange H&S Issues, it should be in accordance with PAS1192-6:2018, Clause 9 and the requirements set out in the SIMP appendix A3 - AIR COBie, ISSUE sheet.

The BEP shall include the following to demonstrate an agreed approach for the project:

- Schedule of work stages and overview of key H&S deliverables and responsibilities against each stage.
- Confirmation of how H&S information shall be captured, shared, and stored.
- Approach to coordinated H&S design and construction risk management including identification, communication, mitigation and recording of related information.
- Strategy for H&S commissioning and operational risk management including the information requirements relating to legislation and emergency planning (reference PAS 1192-6:2018, Clause 7.4)

4.8 Operational and asset information delivery

Asset Information should be delivered in accordance with appendix A2: Asset Information Requirements, appendix A3: AIR COBie, and relevant templates as listed below-: [select templates required on this project]

- T3 Operation & Maintenance Manual
- T4 FM data mapping
- T5 Asset Register

[Appendix **A2**, **A3** and templates **T3** and **T4** must be pre-populated to specify the project asset information requirements for each lead appointed party. **T5** is populated by the Contractor (Lead appointed party) for pre-handover delivery to the Appointing party]

COBie data shall be embedded within native 3D models and verified and validated against BS1192-4:2014, Code of Practice and appendix A2 deliverables. Non native model exchanges shall be via Industry Foundation Class (IFC) 2x3 schema. COBie data shall also be directly exported from 3D models to relevant COBie (excel) spreadsheets for handover to the appointing party at exchange points defined in appendix A2. Reference should be made to template T4 which outlines onward mapping requirements for existing appointing party (client) EAMS and CAFM systems. (refer to 4.9 below)

A project information model (PIM) will be delivered at the final information exchange point by the relevant lead appointed party, with support from the project delivery team(s) and Information Manager. The BEP should set out a clear, detailed methodology to deliver the required asset information for every project information exchange point.

4.9 Software requirements

The appointing party (client) requires the delivery team(s) to utilise the following software applications:

- [State required design and analysis software if applicable]
- [State any other specific software the delivery team will be required to utilise]
- [State any model viewers used for internal federation or visualisation of 3D models, drawings etc]
- [State N/A if not applicable]

The following software applications and versions are currently utilised by the appointing party (client):

EXISTING	Software Application	Version
e.g. CAFM		
e.g. EDMS / CDE		
e.g. Model Viewer		
[other]		

4.10 System Performance

To support the appointing party internal IT system and / or policy requirements and limitations, the following shall to be considered when developing the BIM Execution Plan:

- Individual model size: Practically native models should typically not exceed [200mb is the recommended limit]
- Federated model: The federated model(s) should be regularly purged of old information and should typically not exceed [500mb is the recommended limit]
- Drawing documentation: The stipulated 2D drawing formats to be delivered on this project is .dwg and .pdf. Typically, these files should not exceed [20mb]
- Software uses: The Project Information Model (PIM) should be accessible by the appointing party using free model viewing platforms.
- Access to free viewers: The appointing party should be able to view models, reports etc on portable handheld device e.g. iPad, tablets,
- Security considerations: refer to section 5.3 herein.

5.0 Project information production methods and procedures

<Project Name> <Date> xx/xx/xxxx

Reference BS EN ISO 19650-2, 5.1.5 this section outlines specific information production methods and procedures to be adopted by project delivery team(s)

	to be adopted by project delivery team(s)
Item	Description
5.1 Information	Each prospective lead appointed party shall establish their team(s) information delivery approach and
delivery -	include the following within their tender response:
generation,	• A pre appointment BIM execution plan, which will include a high-level responsibility matrix and
review or	proposed information delivery and federation strategies.
approval	Capability and capacity assessment summary.
app. 0 t a.	Mobilisation Plan.
	Information delivery risk assessment.
	At appointment stage the lead appointed party shall refine and update the above documentation and include agreed exchange information requirements for each appointed party. Information delivery
	plans should be developed and shared to ensure all information is provided by the right party at the right time for the required needs. Each task team shall establish and maintain their own task information delivery plan (TIDP) which the lead appointed party shall aggregate with other task team
	TIDP's to establish the delivery team master information delivery plan (MIDP). TIDP's and MIDP's should be kept up to date throughout the appointment period. Information delivery plan templates T6 and T7 are available for adoption on this project.
	[The following outlines BS EN ISO 19650 part 2 activities to be undertaken at various stages of the
	information delivery and approval process. Any appointing party (client) project specific information
	delivery requirements should be added to the most appropriate section below]
	Generate information
	Each task team shall generate information in accordance with their respective TIDP and the
	requirements outlined in BS EN ISO 19650-2:2018 clause 5.6.2. Native model production and
	associated data delivery should enable the creation of an IFC 2x3 models and COBie data exports
	where applicable. Required non-geometric and geometric information exchange formats are noted in section 5.2 below
	and scheduled across each project delivery stage in appendix A1 - Project and exchange information
	requirements.
	Undertake quality assurance check
	In accordance with BS EN ISO 19650-2:2018 clause 5.6.3 each task team shall undertake a quality
	assurance check of each information container, prior to undertaking a review of the information within
	it. The check should be in accordance with the project information standard. Based on the check
	outcome the appropriate action in clause 5.6.3, a) or b) should be undertaken.
	Review information and approve for sharing
	In accordance with BS EN ISO 19650-2:2018 clause 5.6.4 each task team shall undertake a review of the
	information within each information container prior to sharing within the project common data
	environment. In doing so the task team needs to consider:
	• the lead appointed party's information requirements.
	• the level of information need.
	• information needed for coordination with other task teams.
	Based on the review outcome the appropriate action in clause 5.6.4, a) or b) should be undertaken.
	Information model review
	In accordance with BS EN ISO 19650-2:2018 clause 5.6.5 the delivery team shall undertake timely information model reviews to ensure continual coordination of information across each model element. The review should be repeated as necessary until the information model is ready for

will be accepted by the appointing party.

authorisation by the lead appointing party and should therefore also check against the exchange information requirements, acceptance criteria and the MIDP. Only compliant information containers

5.2 Information Exchange Formats

Refer to appendix A1: EIR, A2: AIR, A3: AIR- COBie, templates T3: Operation & Maintenance Manual for detailed information deliverables, T5: Asset Register

[select all or specific appendix and templates required on this project]

Information container formats shall be delivered per the 'Information Type' columns in appendix A1 at each information exchange point. An overview table is outlined below.

[table to be populated to reflect project requirements]

	Info Exchange	Non-geometric			Geometric			
RIBA stage		.PDF (2.0)	MS word (.doc) v15+ windows	MS Excel (.xls) v15+ windows	2D .dwg 2013+	3D native model	IFC 2x3	COBie data
1- Preparation & Brief (end)	1							N
2 – Concept Design (mid)	2							N
3 - Spatial Coordination (early)	3							Y
4 – Technical Design (end)	4							Υ
5 – Manufacturing & Construction	N/A							
6 – Handover (start)	5							Υ
7 – Use	6							

5.3 Security considerations

The security triage process outlined in PAS 1192-5, figure 5 has determined the following classification for this project:

[Assess and determine suitable security classification with reference to PAS 1192-5. Select from the following]

S1: protect information regarding the asset. Take appropriate steps to protect data/information about neighbouring built asset(s). Use PAS 1192-5 and seek security advice.

S2: protect data/information regarding the asset. Use PAS 1192-5 and seek security advice.

S3: protect commercially and/or personally sensitive data/information regarding the asset. Take appropriate steps to protect data/information about neighbouring built asset(s)

S4: Protection of commercially sensitive and/or personal data/information in the CDE and models is required

[On a typical new build school designed without sensitive or security related zones, systems or departments baseline security measures may only be required. The appointing party should seek specialist advice if any triage outcome other than S4 has been determined]

6.0 Project reference information and shared resources

<Project Name> <Date> xx/xx/xxxx

Reference BS EN ISO 19650-2, 5.1.6 this section establishes the reference information and shared resources to be adopted by project delivery team(s)

	to be adopted by project delivery team(s)								
Item				Description					
6.1 Existing Asset information	eam(s): s for any existi Id be accessible ring protocols s	e via an							
	Information container unique ID (per BS EN ISO 19650-2 National Annex)								
	Project Code	Originator Code	Volume/ System	Level/ Location	File Type	Role	Number (4 to 6 digit)		
	[add additiona	al rows as requi	ired]						
6.2 Shared Resources	and delivery:	Reference BS E	N ISO 19650-2	, 5.1.6, list info	ivery team(s) for rmation contain ect libraries etc	ner unique ID's	-		
	Info	rmation cont	ainer unique	ID (per BS EN	N ISO 19650-2	National An	nex)		
	Project Code	Originator Code	Volume/ System	Level/ Location	File Type	Role	Number (4 to 6 digit)		
			<u> </u>						

Master document control

SFT master workbook reference: SIMP-SFT-XX-XX-WB-Z-0001-S2-P02

[add additional rows as required]

Date: June 2020



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7.0 Information management assignment matrix

<Project Name> <Date> xx/xx/xxxx

This matrix sets out project information management tasks and party responsibilities

Appointing Party - <Appointing Party>
Third Party - xx e.g. 3rd party xxx

Lead Appointed Party - <Lead appointed party>
Appointed Party - e.g. Sub-consultant or Sub-contractor

R - Responsible for undertaking activity
A - Accountable for activity completion
C - Consulted during activity
I - Informed following activity completion

	Delivery Phase	Insert R, A, C, I as required						
BS EN ISO 19650-2 clause:	Task	Appointing party	Third party	Lead appointed party	Appointed party			
5.1.1	Appoint individuals to undertake the information management function	R - A						
5.1.2	Establish the project information requirements	R - A						
5.1.3	Establish the project's information delivery milestones	R - A						
5.1.4	Establish the project's information standard	R - A						
5.1.5	Establish the project's information production methods and procedures	R - A						
5.1.6	Establish the project's reference information and shared resources	R - A						
Note	Consider existing asset information							
Note	Consider shared templates, object, style libraries							
5.1.7	Establish the project's common data environment	R - A						
Note	Establish CDE strategy for project							
Note	Provide system details of Appointing Parties information management/CDE system.							
Note	Provide system details of Lead Appointing Parties information storage/management/CDE system.							
5.1.8	Establish the project's information protocol	R - A						
5.2.1	Establish the appointing party's exchange information requirements	R - A						
Note	Include data requirements and inputs for existing estate management system							
Note	Include data requirements and inputs for existing Computer Aided Facilities Management system							
5.2.2	Assemble reference information and shared resources	R - A						
Note	Assemble/collate existing asset drawings and associated information.							
Note	Assemble and collate existing design and all performance/briefing information.							
5.2.3	Establish tender response requirements and evaluation criteria	R - A						
5.2.4	Compile invitation to tender information	R - A						
5.3.1	Nominate individuals to undertake the information management function			R - A				
5.3.2	Establish the delivery team's (pre-appointment) BIM execution plan			R - A	1			
5.3.3	Assess each task team's capability and capacity			1	R - A			
5.3.4	Establish the delivery team's capability and capacity			R - A				
5.3.5	Establish the delivery team's mobilization plan			R - A				
5.3.6	Establish the delivery team's risk register			R - A				
5.3.7	Compile the delivery team's tender response			R - A				
5.4.1	Confirm the delivery team's BIM execution plan	1		R - A	1			
5.4.2	Establish the delivery team's detailed responsibility matrix			R - A	1			
5.4.3	Establish the lead appointed party's exchange information requirements			R - A				
5.4.4	Establish the task information delivery plan(s)			1	R - A			
5.4.5	Establish the master information delivery plan	1		R - A	1			
5.4.6	Complete lead appointed party's appointment documents	R - A						
5.4.7	Complete appointed party's appointment documents			R - A				
5.5.1	Mobilize resources			R - A	1			
5.5.2	Mobilize information technology	1		R - A	1			
5.5.3	Test the project's information production methods and procedures			R - A	1			
5.6.1	Check availability of reference information and shared resources			1	R - A			
5.6.2	Generate information			1	R - A			
5.6.3	Undertake quality assurance check				R - A			
5.6.4	Review information and approve for sharing				R - A			
5.6.5	Information model review			R - A	R - A			
5.7.1	Submit information model for lead appointed party authorization			1	R - A			
5.7.2	Review and authorize the information model			R - A				
5.7.3	Submit information model for appointing party acceptance			1	R - A			
5.7.4	Review and accept the information model	R - A						
5.8.1	Archive the project information model	R - A						
5.8.2	Capture lessons learned for future projects	R - A		R - A				
	and the second second second by the second s							

	A1 - Project and Exchange information requirements (example)													<project name=""> <date> xx/xx/xxxx</date></project>									
<u> </u>					This table identifi	es the master project informati	on requirement	s and associated excha	ange information requirement	which is filtered to determine the	deliverables for ea	ach lead appointed party. Rel	fer to the SIMP Guidanc	e document section 3.3.5 for a	dditional details on	n how to evolve.							·
					Preparation & Brief	Strategic Outlin			Concept Design	Outline Business	~	Spatial Coord	in the same of the	Full Business Cas		Technical Design	Contract Close		Handover	As Constructed / Handover		Ise	Operation and Maintenance
							_	_			Case			Full business Cas	×e								Operation and Maintenance
PROJECT LEVEL -			APPOINTMENT LEVEL		Delivery Stage: RIBA stage 1	Key decision point date: (Autofil via 1.0 Project info)	xx/xx/xxx	x Delivery	Stage: RIBA stage 2	Key decision point date:	xx/xx/xxxx	Delivery Stage:	RIBA stage 3	Key decision point date:	xx/xx/xxxx	Delivery Stage: RIBA stage 4	Key decision point date: xx/xx/x	xxx D	elivery Stage: RIBA stage 6	Key decision point date: xx/xx/x	oox Delivery Stage	RIBA stage 7	Key decision point date: NA
			(FOR EACH LEAD APPOINTED PARTY)	Info	ormation Exchange: 1	Exchange delivery date:	e.g. 15/01/2	020 Information	Exchange: 2	Exchange delivery date:	e.g. 15/01/2020	Information Exchange:	3	Exchange delivery date:	e.g. 15/01/2020	Information Exchange: 4	Exchange delivery date: e.g. 15/01	/2020 Inform	mation Exchange: 5	Exchange delivery date: e.g. 15/01	/2020 Information Excha	nge: 6	Exchange delivery date: e.g. 15/01/2020
							_															_	
PIR Question	PIR purpose & high level information requirement	AIR refe	Uniclass table Information Container Types 2 (PM) code	Level of	Dep Non-geometric Geometric Geometri	Responsible Party 1. assign to the relevant part using the cell dropdowns. 2. filter at end to establish th individual party deliverables.	Delivery Date	1 8 2 E	Non-geometric Geometri	using the cell dropdowns. 2. filter at end to establish the individual party deliverables.	Information Delivery Date	Non-geom page (p-1) Auto-geomation Need of Non-geomatical Non-geom	Excd 2D Dwgs 3D Model	Responsible Party 1. assign to the relevant party using the cell dropdowns. 2. filter at end to establish the individual party deliverables.	Information Delivery Date	Statuses Information Type Non-geometric Geometric (Y-1) Non-geometric Geometric August Dawn Losse Law Dawn Dawn Dawn Dawn Dawn Dawn Dawn Da	Responsible Party 1. assign to the relevant party using the cell dropdowns. 2. filter and to establish the individual party deliverables. Date	ery 5 c	Security (1-4) Non-geometric Geometric Geometric Goometric Goometr	using the cell dropdowns. 2. filter at end to establish the individual party deliverables.	tion P Non	peometric Geometric P P P P P P P P P P P P P P P P P P P	Responsible Party 1. assign to the relevant party using the cell dropdowns. 2. filter at end to establish the individual party deliverables.
			(Using Uniclass PM table add / remove rows to reflect project information requirements)		(select / add / update	required data below)		_	(select / add / update	required data below)			elect / add / update requir	red data below)		(select / add / update	required data below)		(select / add / updat	e required data below)		(select / add / update requ	ired data below)
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Project information			10 Project information Use cell dropdown	n Use cel	all dropdown	Use cell dropdown		Use cell dropdown		Use cell dropdown		Use cell dropdown		Use cell dropdown	UI	se cell dropdown	Use cell dropdown		Iropdown	Use cell dropdown	Use cell dropdown		Use cell dropdown
YES TBC			10_10_60 Project description TBC	1	1 1	AP	e.g. 15/01/2		1 1	AP		TBC		TBC		4 / /	AP	TBC		TBC	NA NA	\perp	
YES IBC			10_20_107 Brief NA 10_20_26 Environmental policy NA	1 1	1 1	AP TBC	_	TBC	1 1	AP TRC		TBC TBC		TBC TBC		4	AP TBC	TBC		TBC		-	
YES TBC			10 20 28 Exchange information requirement (EIR) NA	1	1 1	AP			1 1	AP		TBC		TBC		4 / /	AP	TBC		TBC	NA NA		
TBC TBC			10_20_30 Feasibility study NA	1		TBC		TBC		TBC		TBC		TBC		TBC	TBC	TBC		TBC	NA NA		
TBC TBC			10_20_75 Stakeholder engagement plan NA	1		TBC		TBC		TBC		TBC		TBC		TBC TBC	TBC	TBC		TBC	NA NA		
TBC TBC			10_20_84 Statement of security requirement NA	1	1 1	TBC AP		TBC	1 1	TBC		TBC		TBC TBC		TBC 4	TBC AP	TBC TBC TBC		TBC TRC	NA NA		
TRC TBC			10_20_92 User requirement document (Room data sheets) NA 10_80_10 Accommodation and layout plan NA	1	+ + * + * + +	TBC		TBC	*	TBC		TBC		TBC		TBC	TBC	TBC		TBC	NA NA		
TBC TBC			10_80_75 Space design (2D) TBC	1		TBC		TBC		TBC		TBC		TBC		TBC	TBC	TBC		TBC	NA NA		
TBC TBC			10 80 75 Snare design (3D) NA	1	11	TRC		TRC		TRC		TRC		TBC	- 11	TBC 4 4 4	TBC	TBC		TBC	NA NA		
YES TBC			10_80_ 85 Space standard NA	1		AP			1 1	AP		3 4 4		AP			AP	TBC		TBC	NA NA	-	
Site, ground and environmental information			20 Fite around and environmental information	-											-			_					$\overline{}$
TRC TBC			30 Site, ground and environmental information 30_10_15 Condition survey information NA	1	111	AP	_	TBC		TRC		TBC		TRC		TBC	TRC	TBC		TRC			
TBC TBC			30_10_80 Site boundary information (Location plan) TBC	1	/ /	AP		TBC		TBC		TBC		TBC		TBC	TBC	TBC		TBC	NA NA		
TBC TBC			30_40_ 06 Asbestos survey report NA	1	1 1 1	AP		TBC		TBC		TBC		TBC		TBC	TBC	TBC		TBC	NA NA		
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Project performance requirements			35 Project performance requirements	-																			
Design and approvals information		_	40 Design and approvals information	-											-			\dashv					$\overline{}$
YES TBC				1	1 1 1	AP		TBC		TRC		TBC		TBC		TBC	TBC	TRC		TRC	NA NA		
TBC TBC			40_60_07 Benefits realisation plan NA 40_60_16 COBle data sheet (add new row for each LAP) NA	NA.				NA.		NA NA		TBC 3		LAPxx <add name="" org=""></add>		TBC 4	1 8 Days and discourses	TBC 5		LAPxx <add name="" org=""></add>	NA NA		
YES TBC			40_60_41 Information delivery plan NA YES	- 1	1 1	NA AP				TBC		TBC		TBC		TBC	TBC	TBC		TBC	NA NA		
YES TBC			40_60_ 62 Post occupancy evaluation NA	1	1 1 1	AP		TBC	-	TBC		TBC		TBC		TBC	TBC	TBC		TBC	NA NA	\perp	
YES TBC			40_60_70 Risk schedule NA	1 1	111	AP	+	TBC		TBC		TBC	 	180		186.	TBC	TBC		IBC	NA NA	-	
Financial and commercial information			50 Financial and commercial information																				
YES TBC			50_30_10 Business Case NA	1	11	AP		2	1 1	AP		3 4 4		AP		4 / /	AP	TBC		TBC	NA NA		
YES TBC e.g. Is the project within the approved budget?	g A project cost plan is required at key decision points 2, 3 and 4		50_30_18 Cost model and indicative costing A4					2	1 1 1	TBC		3 1	1	TBC		4 / / /	TBC						
<add row=""></add>				41														-				\perp	
Contract information			55 Contract information																				
(ADD ROW)			60 Construction management information	-														_				\rightarrow	
Construction management information			60 Construction management information	-																			
Testing, Commissioning and completion informa	ation	_	70 Testing, Commissioning and completion information																				
<add row=""></add>				7														$\neg \vdash$					
Asset management information			80 Asset management information																				
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A2 - Asset Information Requirements (AIR) (example)

<Project Name>

Maintainable Assets List

This table sets out the high level asset information requirements to be delivered by the lead appointed parties. Specific deliverables are outlined via associated templates.

							Which		IVIAII	Why	ole Asse		What Inf	ormation		
						Asset			veys	Best	Ξ		et ·8·	_		
Uniclass 2015				NR	IM3	(Y/N) Project Maintainable	ference	reference	Periodical Condition Survey	Statutory Compliance/ E Practice check	PPM (Planned Preventative, Maintenance) F	data	Additional asset model data (e.g. NRM, SFG20)	Operation and Maintenance Manual	Asset Register	
System: Ss Release version X X	Products: Pr Release version X.X	Le	vel 2 and 3 - Elements & Sub-Elements		Level 4 and 5 - Components	(Y/N) I	PIR refer	AIR rei	Period Condit	Statuto Compl Practic	PPM (I Prever Mainte	COBie data	Addition model NRM,	Operal Mainte Manua	Asset I	Comment
Code Title	Code Title						I					Appendix A3		Template T3 Te	mplate T5	
				1.1.3.1	Lowest floor construction	FILTER	FILTER	TBC	YES	FILTER	FILTER					
				1.1.3.7	Drainage below ground, including trenches	YES		TBC TBC	YES YES							
				1.1.3.9	Gullies, floor outlets and the like (e.g. channels) Internal manholes	YES		TBC	YES							
		2.2.1	Floors	2.2.1.6	(Includes Level 5 components) Timber floors	YES		ТВС	YES YES							
				2.2.1.7	Structural screeds	YES		TBC	YES							
		2.2.2	Balconies Drainage to balconies		(Includes Level 5 components 1-4) (Includes Level 5 components 1-3)	YES YES			YES							
					Rainwater downpipes	YES		TBC	YES							
Ss_30_10		2.3.1	Roof structure	2.2.3.2	Floor outlets (Includes Level 5 components 1-18)	YES		TBC	YES							
		2.3.2	Roof coverings Specialist roof systems		(Includes Level 5 components 1-10) (Includes Level 5 components 1-4)	YES			YES YES							
		2.3.3	Specialist 1001 Systems	2.3.3.2	Glazed roofing systems	YES		TBC	YES							
		2.3.4	Roof drainage	2.3.4.1	(Includes Level 5 components 1-6) Gutters	YES		TBC	YES							
				2.3.4.2	Rainwater pipes	YES		ТВС	YES							
		2.3.5	Rooflights, skylights and openings	2.3.5.1	(Includes Level 5 components 1-8) Rooflights, skylights and openings	YES YES	<u></u>	ТВС	YES YES							
					Opening gear, frames, kerbs and glazing	YES		TBC TBC	YES							
				2.3.5.1.6	Roof hatches Access hatches to roof space	YES		TBC	YES							
		2.3.6	Roof features	2.3.5.1.7	Smoke vents (Includes Level 5 components 1-10)	YES		ТВС	YES YES							
		2.3.0		2.3.6.1	Roof features	YES		ТВС	YES							
				2.3.6.1.5	Plant enclosures and the like, including louvres Access systems for roof cleaning	YES YES		TBC TBC	YES YES							
				2.3.6.1.8	Roof edge protection (permanent)	YES		ТВС	YES							
		2.4.1	Stair/ ramp structures	2.3.6.1.9	Balustrades and handrails to roof edges (Includes Level 5 components 1-6)	YES YES		TBC	YES							
				2.4.1.1	Stair structures	YES		TBC TBC	YES							
				2.4.1.2	Fire escape staircases Ramp structures	YES		TBC	YES							
		2.4.2	Stair/ ramp finishes	2.4.2.1	(Includes Level 5 components 1-5) Stair finishes	YES		ТВС	YES YES							
				2.4.2.2	Ramp finishes	YES		ТВС	YES							
		2.4.3	Stair/ ramp balustrades and handrails	2.4.3.1	(Includes Level 5 components 1-4) Wall handrails	YES YES		TBC	YES							
				2.4.3.2	Combined balustrades and handrails	YES		ТВС	YES							
		2.4.4	Ladders/ chutes/ slides	2.4.4.1	(Includes Level 5 components 1-5) Ladders	YES		TBC	YES							
		2.5.1	External enclosing walls above ground FL		(Includes Level 5 components 1-28)	YES			YES							
				2.5.1.10	External walls above ground level: (state details) Safety barriers, handrails, combi balusters & handrails (façade fixed)	YES		TBC TBC	YES							
		2.5.2	External enclosing walls below ground floor level	2.5.1.11	Finishes applied to external walls (state details) (Includes Level 5 components 1-25)	YES		TBC	YES YES							
		2.3.2	External enclosing wans below ground noon level	2.5.2.1	External walls below ground level: (state details)	YES		ТВС	YES							
		2.5.3	Solar/ rain screening	2.5.2.6	Finishes applied to external walls (state details) (Includes Level 5 components 1-2)	YES YES		TBC	YES YES							
		2.5.4	External soffits		(Includes Level 5 components 1-8)	YES			YES							
				2.5.4.4	Access hatches Finishes applied to external soffits	YES		TBC TBC	YES							
		2.5.5	Subsidiary walls, balustrades and proprietary balconies		(Includes Level 5 components 1-9)	YES			YES							
				2.5.5.1	Walls: (state details) Combined balustrades and handrails	YES YES		TBC TBC	YES							
				2.5.5.4	Wall mounted handrails	YES		ТВС	YES							
				2.5.5.5 2.5.5.7	Parapet railings Rainwater downpipes	YES		TBC TBC	YES							
		250	Facade access / cleaning sustain	2.5.5.8	Floor outlets (Includes Level 5 components 1-6)	YES		ТВС	YES	YES						
		2.5.6	Façade access / cleaning systems	2.5.6.1	(Includes Level 5 components 1-6) Facade cleaning systems	YES		ТВС	YES	YES	ТВС					
					Window / façade cleaning cradles Building maintenance units (BMU)	YES		TBC TBC		YES YES	TBC TBC	TBC				
		2.6.1	External windows		(Includes Level 5 components 1-14)	YES			YES							
				2.6.1.1	Windows Windows including opening lights, glazing, ironmongery	YES YES		TBC TBC	YES							
		200			Canopies over windows and shop fronts	YES		ТВС	YES							
		2.6.2	External doors	2.6.2.1	(Includes Level 5 components 1-19) External doors	YES		TBC	YES							
				2.6.2.1.2	Entrance screens and doors inc. frames Manual and automatic doors	YES		TBC TBC	YES YES	YES	ТВС					
				2.6.2.1.13	Ironmongery - including door closers, panic locks and the like.	YES		TBC	YES	YES	ТВС					
				2.6.2.4	Roller shutters, sliding shutters Canopies	YES	<u> </u>	TBC TBC	YES YES	YES	TBC					
				2.6.2.8	Architraves	YES	_	ТВС	YES							
		2.7.1	Walls and partitions	2.7.1.1	(Includes Level 5 components 1-19) Internal walls (full height and low level)	YES		TBC	YES							
					Borrowed lights / glazed screens and the like Fixed partitions	YES		TBC TBC	YES YES							
		2.7.2	Balustrades and handrails	2.7.1.5		YES		180	YES							
		2.7.3	Moveable room dividers Cubicles		(Includes Level 5 components 1-2)	YES	<u> </u>		YES YES							
		2.8.1			(Includes Level 5 components 1-10)	YES			YES							
					Internal doors Fanlights, over-panels and sidelights integral to the door set	YES YES		TBC TBC	YES							
				2.8.1.1.5	Glazed vision panels and the like	YES		TBC	YES		<u> </u>	!	-			
				2.8.1.1.6	Sliding and folding doors in fixed partitions Hatches	YES		TBC TBC	YES							
					Ironmongery Fig. resisting doors	YES		TBC	YES	YES	TBC			ļ <u>†</u>		
					Fire resisting doors Roller shutters / sliding doors and the like	YES		TBC TBC	YES	YES	TBC TBC					
		311	Wall finishes	2.8.1.6	Architraves (Includes Level 5 components 1-12)	YES		TBC	YES YES							
		3.1.1	wall lilliplic?		medades Level 3 components 1-12)	152			153							

A2 - Asset Information Requirements (AIR) (example)

<Project Name>

What Information

Maintainable Assets List

Why

Which

This table sets out the high level asset information requirements to be delivered by the lead appointed parties. Specific deliverables are outlined via associated templates.

						set	Which		y ₁	Why	-		What Info	31111411011		
Uniclass 2015	Classification			NR	IM3	ect ble Ass	nce	nce	Periodical Condition Survey	e/ Bes	ned ive, nce) FN	e	Additional asset model data (e.g. NRM, SFG20)	and	ster	
System: Ss	Products: Pr	Le	vel 2 and 3 - Elements & Sub-Elements		Level 4 and 5 - Components	(Y/N) Project Maintainable	refere	refere	odical	utory npliand	PPM (Planned Preventative, Maintenance) FI	COBie data	litional del dat A, SFG:	Operation and Maintenance Manual	sset Register	Comment
Release version X.X	Release version X.X	Le	ver 2 and 3 - Elements & Sub-Elements				R	AIR		Stat Con Prac	PPN Prev Mai	COB	Add moc NRN	Ope Mai Mar	Asse	Comment
					In-situ coatings applied to walls Plasterboard or other sheet linings, including fixing systems	YES YES		TBC	YES							
					Ceramic wall tiling	YES		TBC	YES							
				3.1.1.1.5	Decorative sheet coverings e.g. paper, vinyl, plastic, textile	YES		ТВС	YES							
				3.1.1.1.8	Proprietary impact and bumper guards, protection strips and the like	YES		TBC	YES							
		3.2.1	Finishes to floors	3.2.1.1	(Includes Level 5 components 1-19) Finishes to floors	YES YES		ТВС	YES							
		3.2.2	Raised access floors	3.2.1.1	(Includes Level 5 components 1-2)	YES		150	YES							
				3.2.2.1	Raised access floor systems	YES		TBC	YES							
		3.3.1	Finishes to ceilings	-	(Includes Level 5 components 1-7)	YES			YES							
					Linings to ceilings e.g. dry lined plasterboard, timber boarding Linings to sides and soffits of beams, bulkheads and the like	YES YES		TBC TBC	YES							
		3.3.2	False ceilings	3.3.1.1.2	(Includes Level 5 components 1-7)	YES		150	YES							
				3.3.2.1.1	In-situ/ board ceilings including soffit linings, battens, framework	YES		ТВС	YES							
				3.3.2.3	Access hatches and the like	YES		TBC	YES							
		3.3.3	Demountable suspended ceilings	3.3.3.1	(Includes Level 5 components 1-7) Demountable suspended ceiling	YES YES		ТВС	YES							
				3.3.3.1.1	Proprietary suspended ceiling systems	YES		TBC	YES							
				3.3.3.3	Access hatches and the like	YES		ТВС	YES							
				4.1.1.3.14	Hand held fire fighting equipment e.g. extinguisher, fire blankets	YES		TBC	YES	YES	TBC					
		4.1.2	Domestic kitchen fittings and equipment	4.1.2.1	(Includes Level 5 components 1-10) Kitchen units	YES YES		ТВС	YES							
				4.1.2.2	Kitchen appliances	YES		TBC	YES							
		4.1.4	Signs/ notices		(Includes Level 5 components 1-8)	YES			YES	YES						
		5.1.1	Sanitary Appliances		(Includes Level 5 components 1-14)	YES			YES							
					Sanitary appliances WC pages and cisterns, WC suites, slop hoppers, urinals and cisterns	YES YES	_	TBC TBC	YES							
				5.1.1.1.1	WC pans and cisterns. WC suites, slop hoppers, urinals and cisterns Sinks	YES		TBC	YES							
					Wash basins, hand rinse basins, wash fountains	YES		ТВС	YES		<u> </u>					
				5.1.1.1.6	Shower trays	YES		ТВС	YES							
					Shower units - including head and hose	YES		TBC	YES							
					Shower valves Drinking fountains	YES		TBC TBC	YES YES	YES						
					Taps, and waste outlet fittings	YES		ТВС	YES							
				5.1.1.1.13	Automated controls and sensors	YES		ТВС	YES							
				5.1.1.1.14	Final connections e.g. stop cocks, stop taps	YES		TBC	YES							
		5.1.2	Sanitary Ancillaries	5.1.2.1	(Includes Level 5 components 1-9) Sanitary fittings	YES		ТВС	YES YES							
					Hand dryers	YES		TBC	YES							
		5.2.1	Services equipment		(Includes Level 5 components 1-4)	YES			YES							
				5.2.1.1	Services equipment	YES		TBC	YES							
					Catering equipment	YES		TBC	YES							
		5.3.1	Foul drainage above ground	5.2.1.1.2	Sinks - supplied as integral with catering equipment (Includes Level 5 components 1-7)	YES		TBC	YES							
				5.3.1.1	Drainage to sanitary appliance	YES		ТВС	YES							
				5.3.1.2	Drainage to services equipment	YES		ТВС	YES							
					Waste pipes and fittings	YES		TBC	YES							
					Discharge stacks and waste pipes Ventilating stacks and pipes	YES YES		TBC TBC	YES							
					Air admittance valves	YES		TBC	YES							
					Traps access points, rodding eyes, collars and the like	YES		ТВС	YES							
		5.3.2	Chemical, toxic and industrial liquid waste drainag		(Includes Level 5 components 1-15)	YES			YES							
					Drainage to appliances or equipment; Distribution pipelines and fittings - inc. glass drainage	YES YES		TBC TBC	YES YES							
					Traps, access points and rodding eyes	YES		ТВС	YES							
					Gullies	YES		ТВС	YES							
				5.3.2.1.4	Connections to tanks and the like	YES		TBC	YES							
					Storage tanks and vessels Thermal insulation	YES YES		TBC TBC	YES YES							
					Control components located externally	YES		ТВС	YES							
				5.3.2.1.14	Monitoring equipment located externally	YES		ТВС	YES							
		F 2 -	Police Disposal	5.3.2.1.15	Painting / anti-corrosion treatments	YES		ТВС	YES							
		5.3.3	Refuse Disposal	5.3.3.1	(Includes Level 5 components 1-9) Refuse disposal installations	YES		ТВС	YES							
					Refuse collection equipment including bins	YES		ТВС	YES	L						
				5.3.3.1.8	Painting / anti-corrosion treatments	YES		ТВС	YES							
		5.4.1	Mains water supply		(Includes Level 5 components 1-7)	YES		TOC	YES	YES						
					Mains water supply Pipelines and fittings	YES YES	 	TBC TBC	YES	YES						
				5.4.1.1.2	Valves	YES		TBC	YES	YES						
					Water meters - internal	YES		ТВС	YES	YES						
					Rising main to storage tanks	YES		ТВС		YES						
				5.4.1.1.7 5.4.1.2	Thermal insulation Testing of installations	YES		TBC TBC	YES	YES						
				5.4.1.3	Commissioning of installations	YES		TBC		YES						
		5.4.2	Cold water distribution		(Includes Level 5 components 1-13)	YES			YES	YES						
				5.4.2.1	Cold water distribution	YES		TBC	YES	YES	ļ					
				5.4.2.1.1	Cold water distribution pipelines and fittings Valves	YES YES		TBC	YES YES	YES						
				5.4.2.1.3	Water saving devices	YES		TBC		YES						
					Taps (where not part of sanitary fittings)	YES		ТВС	YES	YES						
					Pumps	YES		TBC	YES	YES						
					Instrumentation and controls	YES YES		TBC TBC	YES	YES	ļ					
					Thermal insulation Storage tanks	YES		TBC	YES	YES						
					Water storage tanks and cisterns	YES		ТВС	YES	YES						
					Testing of installations	YES		TBC		YES						
				5.4.2.5	Commissioning of installations	YES		TBC		YES						

A3 - AIR (COBie) (example)

<Project Name>

<Date> xx/xx/xxxx

This table identifies the required project COBie data requirements, responsibilities and exchange points which is filtered to determine the deliverables for each lead appointed party.

COBie parameter values should align with BS 1192-4 examples, unless noted otherwise in 'comments' column. Refer to the SIMP Guidance document section 3.3.7 for additional details on how to evolve.

	Required
	Reference to other sheet
Key	External Reference
	If specified as required
	Not required

= Grey fill cells indicate no COBie data deliverable for that information exchange

			Information Exchange 03	Information Exchange 04	Information Exchange 05		
				RIBA stage 3	RIBA stage 4	RIBA stage 6	
Sheet Name	Cell Colour	COBie Parameter	Data Rqd (Y/N)		assign a Lead Appointed Party for e essary to assign the same COBie pa		Comment
			EII TED	E FED	Ell TED	FILTER	Note: update LAP list via Picklist sheet
	İ	Email	FILTER YES	FILTER e.g. LAP01 AceArchitect	FILTER e.g. LAPO1 AceArchitect	FILTER e.g. LAP01 AceArchitect	Note: update LAP list via Picklist sneet
		e.g. Email	YES	e.g. LAPO2 AceContractor	e.g. LAPO2 AceContractor	e.g. LAPO2 AceContractor	
		CreatedBy	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
-		CreatedOn	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
IAC		Category	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	use Uniclass 2015 - Ro table
CONTACT		Company	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
0		Phone	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		ExternalSystem	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		ExternalObject	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		ExternalIdentifier	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		Name	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		CreatedBy CreatedOn	YES YES	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	
		Category	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	use Uniclass 2015 - En table
		ProjectName	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	ase officials 2015 Efficiency
		SiteName	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
	••••••	LinearUnits	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
>		AreaUnits	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
FACILITY		VolumeUnits	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
FAC		CurrencyUnit	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		AreaMeasurement	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		ExternalSystem	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		ExternalProjectObject ExternalProjectIdentifier	YES YES	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	
		ExternalSiteObject	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		ExternalSiteIdentifier	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		ExternalFacilityObject	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		ExternalFacilityIdentifier	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		Name	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		CreatedBy	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
8		CreatedOn	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
FLOOR		Category	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
	·····-	ExtSystem ExtObject	YES	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	
	·····-	ExtIdentifier	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		Name	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		CreatedBy	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		CreatedOn	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
빙		Category	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	use Uniclass 2015 - SL table
SPACE		FloorName Description	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	
	······	ExtSystem	YES	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""></add>	
	·····-	ExtObject	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
	······-	ExtIdentifier	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		Name	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		CreatedBy	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		CreatedOn	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
ONE		Category	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
Z		SpaceNames ExtSystem	YES	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	
	······	ExtObject	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		ExtIdentifier	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		Name	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		CreatedBy	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		CreatedOn	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		Category	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	use Uniclass 2015 - Pr table
		Description AssetType	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	
		Manufacturer	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""></add>	
		ModelNumber	YES			LAPxx <add name="" org=""></add>	
		WarrantyGuarantorParts	YES			LAPxx <add name="" org=""></add>	
TYPE		WarrantyDurationParts	YES			LAPxx <add name="" org=""></add>	
7		WarrantyGuarantorLabor	YES			LAPxx <add name="" org=""></add>	
		WarrantyDurationLabor	YES			LAPxx <add name="" org=""></add>	
		WarrantyDurationUnit	YES	I A Down and all a construction	I A Down and all a construction	LAPxx <add name="" org=""></add>	
		ExtSystem ExtObject	YES	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	LAPxx <add name="" org=""> LAPxx <add name="" org=""></add></add>	
		ExtIdentifier	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		DurationUnit	YES			LAPxx <add name="" org=""></add>	
		NominalLength	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		NominalWidth	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
		NominalHeight	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	1

	Name	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
	 				†	
	 CreatedBy	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
Þ	 CreatedOn	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
Ä	TypeName	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
8	Space	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
COMPONENT	Description	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
Ö	ExtSystem	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
	ExtObject	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
	ExtIdentifier	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
_	Name	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
를	CreatedBy	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
SYSTEM	CreatedOn	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
•,	Category	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	use Uniclass 2015 - Ss table
	 Name	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	COBie.Issue used to capture,
	CreatedBy	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	document and exchange H&S risks as
	CreatedOn	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	advised in the SIMP workbook, Section
	Type	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	4.8 and in accordance with PAS 1192-
ISSUE	Risk	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	6:2018, Clause 9.
ISS	Chance	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
	Impact	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
	Description	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
	Owner	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	
	Mitigation	YES	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	LAPxx <add name="" org=""></add>	



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