

Digital Project Delivery

**Alberta Health Services
Asset Information Management
Small Projects Requirements**

Appendix 001- AIC Form Instructions- AHS

AIC Forms Instructions Objective

The following document details the intended use and formatting of required data within the Asset Information Collection Forms and serves as a set of instructions to assist project teams in completing Alberta Infrastructure's Asset Information Management (AIM) deliverables. These instructions will facilitate the delivery of digital information on buildings, systems, and products to the Province during the handover phase, to be used through the project life cycle.

The AIC Form Instructions document is an Appendix and shall be read in conjunction with Alberta Infrastructure's AIM Requirements for Small Projects.

1. AIC Forms General

- .1 Information contained within the AIC forms shall be consistent with all contract documents.
- .2 The formatting, formulas and layout within the AIC forms shall not be edited. Any unauthorized editing may result in errors within the form templates, loss of information and a noncompliant AIC Form workbook deliverable.
- .3 Additional rows shall be inserted as required in the locations specified on the forms only. Rows inserted in locations not specified may result in errors within the form templates.
- .4 Pick-lists contained within the AIC Forms workbook shall not be edited or overridden with manual entry.
- .5 No required fields within the AIC forms shall remain blank. Required fields are indicated in the header with a *.
- .6 All area measurements within the AIC forms shall be entered in square meters.
- .7 Refer to *AHS-AI-TSB-XX-TMP-AIC Forms Example.xlsx* for an example of a completed set of project AIC Forms.
- .8 Use the following legend when referencing the responsibility in the tables below:

R	Responsibility	Description
0	n/a	Indicates the field will be automatically populated using excel references/formulas. No action is required.
1	Pre-populated by Province and/or Client	Indicates the field will be populated by the Province prior to distribution of the forms.
2	Input by Contractor	Indicates the field will be populated by the Contractor prior to Substantial Performance.

2. Contacts Register

2.1 General

- .1 Only one Contacts Register shall be delivered per project. Do not duplicate this tab in the workbook.

2.2 Contacts Table

- .1 The Contacts table shall be populated/updated by the Contractor as new participants are added throughout the project duration.
- .2 All project participants involved in the work shall be itemized in the Contact table on the Project Info Form including; contractors, manufacturers and vendors.

- .3 Only generic company emails/phone numbers shall be listed within the Contacts Table. No personal information shall be included on the Contacts Table.
- .1 Email domains shall match those utilized on each company's contact web page.
 - .2 Phone numbers shall match those utilized on each company's contact web page.
- .4 The Contact stable on the Contacts Register tab shall be populated as follows:

Field Name	Entry Format	R	Description
EMAIL	Manual Entry	2	Each Contacts respective email address
CATEGORY	Drop-down selection	2	Selection from "Contact Category" pick list
COMPANY	Manual Entry	2	Each Contacts respective company
PHONE	Manual Entry	2	Each contact's phone number, in format 000-000-0000

3. Space Register

3.1 General

- .1 Only one Space Register shall be delivered per project. Do not duplicate this tab in the workbook.

3.2 Facility Table

- .1 The Facility Table shall be populated by the Province and/or Client prior to the distribution of the forms.
- .2 The Facility table on the Space Register tab shall be populated as follows:

Field Name	Required Format	R	Description
BUILDING ID	Manual Entry	1	Internal eFacilities building ID, provided by AHS
RAPP ID	Manual Entry	1	Internal RAPP project ID, provided by Alberta Infrastructure
BUILDING NAME	Manual Entry	1	Internal eFacilities building name, provided by AHS
PROJECT NAME	Manual Entry	1	Internal RAPP project name, provided by Alberta Infrastructure

3.3 Space Table

- .1 The Space table shall be populated/updated by the Contractor as they complete work in various spaces throughout the project duration.
- .2 All Rooms affected by the work, regardless of disposition (New, Modified, Removal or No Change) shall be itemized in the Space Table in the Space Register.
- .3 Any mechanical or structural access spaces, such as plenums or under floor spaces shall be included as rows in the Space table.
- .4 To allow location of assets placed outside, under, or above the building, spaces titled "SITE", "FOUNDATION", and "ROOF" shall be created and listed as required.

- .5 The Space Table is used to create the drop down selection list on the Asset Register. Any space not included in the Space Table will not be available in this drop down selection.
- .6 The Space table on the Space Register tab shall be populated as follows:

Field Name	Required Format	R	Description
Building ID	Auto populated	0	Building ID identified in cell A5
Floor	Manual Entry	2	Floor on which the room can be found.
Space ID	Manual Entry	2	Unique number for each space as per the construction documents.
Room Name	Manual Entry	2	Name for each space as per the construction documents.
Disposition	Drop down selection	2	List indicating the status of each space
Area	Manual Entry	2	Area of the space in square meters

3.4 Additional Specifications

- .1 Floors within the Space Table shall be coded/assigned as per the following:
 - .1 FP01- Shall be used to identify the main floor. The main floor is identified as the floor containing the main entry to the building.
 - .2 FP##- Shall be used to identify all floors numerically above the main floor, including parking levels above grade.
 - .3 BP##- Shall be used to identify all floors numerically below the main floor, including parking levels below grade.
 - .4 MP##- Shall be used to identify all mezzanine floors numerically, indicating the floor level the mezzanine is found within.
- .2 Space ID numbers shall not be duplicated, including existing Space ID numbers. List of existing space numbers to be provided by the Province and/or Client.
- .3 Existing Room Names to be consistent with internal AHS records. List of existing Room Names to be provided by the Province and/or Client.

4. Asset Register

4.1 General

- .1 Only one Asset Register shall be delivered per project. Do not duplicate this tab in the workbook.
- .2 All word separations within the Asset Register shall use a “_” character. No spaces shall be used on the Asset Register.
- .3 All data input within the Asset Register shall be entered in ALL CAPS.
- .4 All empty/not applicable fields, as per section 4.1.2, shall contain “N/A”.
- .5 No blank fields shall remain in the Asset Register.

4.2 Asset Table

- .1 All assets identified in the Maintainable Asset List, regardless of status (Moved, Replaced, New, or Removed) shall be captured in the asset table by the Contractor.
- .2 The Asset table shall be populated/updated by the Contractor as equipment is installed, removed, or moved throughout the project duration.
- .3 The Asset table on the Asset Register tab shall be populated as follows:

Field Name	Required Format	R	Description
Tag	Manual Entry	2	Unique ID number for each asset as per the construction documents.
Disposition	Drop-down selection	2	Indicates the status of each of the listed assets.
Category	Drop-down selection	2	Indicates the Uniclass category for each listed asset. Drop down list based on project maintainable asset equipment list.
AHS Definition	Auto Populated	0	Indicates the data requirement as described in section 4.3.4 below.
System Tag	Manual Entry	2	Indicates the system on which the asset is installed, as per section 4.3.4 below.
Manufacturer	Drop down selection	2	Manufacturer for each listed asset. Drop down list based on Contact Table.
Model Number	Manual Entry	2	Model Number as it appears on the manufacturer tag/plate affixed to each asset.
Serial Number	Manual Entry	2	Serial Number as it appears on the manufacturer tag/plate affixed to each asset.
Existing Room Number	Drop Down List	2	Indicates installed location of each listed asset. Drop down list populated from Spaces Register.
New Room Number	Drop Down List	2	Indicates installed location of each listed asset. Drop down list populated from Spaces Register.
AHS Barcode	Manual Entry	2	Indicated the affixed AHS Barcode number, as per section 4.3.3
Comments	Manual Entry	2	Optional field to capture additional information

4.3 Additional Specifications

- .1 Tags shall not be duplicated within any one building, including existing asset Tags. List of existing Asset Tags to be provided by The Province and/or Client.
- .2 Room Numbers shall be captured for each listed asset according to Disposition as follows:
 - .1 For Additions, capture only New Room Numbers.
 - .2 For Replacements/Moves, capture both the Existing and New Room Numbers.
 - .3 For Removals, capture only the Existing Room Numbers.
- .3 AHS Barcode numbers shall be captured where existing/new asset tags area available
 - .1 Asset Tags are identified as plastic rectangular tags, physically affixed to an asset, beginning with a "C" or an "M" prefix.

.4 AHS Definitions:

- .1 The AHS Definition field is automatically populated into the forms for each listed asset using excel formulas/references. A data requirement level is pre-determined for each category within the Maintainable Asset List, provided by the Client.
- .2 The information required in the forms differs for each AHS Definition. Capture information within the Asset Table for each indicated AHS Definition as follows:
 - .1 For all AHS Definitions:
 - .1 Asset Tag is required.
 - .2 Disposition is required.
 - .3 Category is required.
 - .4 Manufacturer is required.
 - .5 Room Numbers are required, as per section 4.1.1
 - .6 AHS Barcodes are required, as per section X.XX
 - .2 For Individual Assets:
 - .1 System Tag:
 - .1 The System Tag should be listed as the parent asset tag. i.e. AHU-1
 - .2 Where the listed asset is not connected to a larger system, and is a standalone asset, the System Tag is not required. i.e. RTUs
 - .2 Model Numbers are required.
 - .3 Serial Numbers are required.
 - .3 For Component of an Asset:
 - .1 Asset Tag shall reflect the parent asset tag. i.e. AHU-1
 - .2 System Tag is not required.
 - .3 Model Numbers are required.
 - .4 Serial Number is not required.
 - .4 Component of a System
 - .1 System Tag is mandatory.
 - .1 The System Tag should be listed as the parent asset tag, or type of system. i.e. AHU-1, B-1, or Nurse Call.
 - .2 Model Number is required where available.
 - .1 Where the Model Number is not available, then component attributes will form the model number. Examples:
 - .1 For Electrical Panels, use Volts/Phase/Amps/Circuits:
"120/208/1/100/42"
 - .2 For Breakers, use Poles/Amps: "2/30"
 - .3 For Valves, use Size/Type/Area Served:
"37/ISOLATION/MECH ROOM 7"
 - .3 Serial Number is not required.
 - .5 For Component of a Space
 - .1 These Assets are not required to be captured. No action is required.

5. Document Register

5.1 Document Table

- .1 The Document table shall be populated/updated by the Contractor throughout the project duration.
- .2 All files required for handover documentation as specified in *01 78 23 Operation and Maintenance data and Manuals* of the Province's Master Specification, shall be itemized in the Document table by the Contractor. These files include but are not limited to:
 - .1 Shop Drawings
 - .2 Product Data
 - .3 Manufacturers' Reports
 - .4 Commissioning Reports
 - .5 Testing Reports
 - .6 Product Certificates
 - .7 Warranties
 - .8 Site Photos
 - .9 As-Built Drawings
- .3 Each document shall have a unique file name, Compliant with the Project's Codification Standard.
- .4 Only relative path types shall be listed in the File Directory field of the Document Register Form.
- .5 The Document table on the Document Register Form shall be populated as follows:

Field Name	Required Format	R	Description
FILE NAME	Manual Entry	2	The name of the file, including file type suffix
CATEGORY	Drop-down selection	2	Selection from "Document Category" pick list
APPLIES TO	Manual Entry	2	Which Component/Type/Floor etc. the document applies to
TABLE FOUND	Drop-down selection	2	The table in which the "Applies to" component can be found
FILE DIRECTORY	Manual Entry	2	The sub-folder directory within the zip deliverable where the document can be found.
SPEC SECTION	Manual Entry	2	The spec section which the document applies to

6. Pick-Lists Tab

The Pick-Lists Tab is a hidden tab within the AIC Forms workbook which contains background tables and formulas enabling specific functionality within the form templates.

- .1 The Pick-Lists tab shall not be edited, modified or deleted. Any unauthorized editing may result in errors within the form templates, loss of information and a noncompliant AIC Form workbook deliverable.