

# **Digital Project Delivery**

**Alberta Infrastructure  
Asset Information Management  
Small Projects Requirements  
Appendix 001- AIC Form Instructions**

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**Change History**

| Date         | Version | Description                             |
|--------------|---------|---|
| October 2018 | V001    | First Release                           |
| April 2024   | V002    | Updates to the table content and format |
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**AIC Forms Instructions Objective**

The following document details the intended use and formatting of required tables on the Asset Information Collection (AIC) 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 building, system, and product information to the Province 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 compliant with the Province's *AIM Small Projects Requirements*.
- .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 No fields within the AIC forms shall remain blank.
- .4 All area measurements within the AIC forms shall be entered in square meters.
- .5 Refer to *GOA-AI-TSB-TMP-AIC Forms Example.xlsx* for an example of a completed set of project AIC Forms.
- .6 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 references/formulas. No action is required. |
| 1 | Input by Consultant | Indicates the field will be populated by the Consultant prior to Project Tender.                      |
| 2 | Input by Contractor | Indicates the field will be populated by the Contractor prior to Substantial Performance.             |

## 2. Contact Tab

### 2.1 Contact Table

- .1 The Contact table shall be populated/updated by both the Consultant and Contractor as new participants are added throughout the project duration.
  - .1 Contact information for parties on-boarded during design shall be entered by the Consultant.
  - .2 Contact information for parties on-boarded during construction shall be entered by the Contractor.
- .2 All project participants involved in the work shall be itemized in the Contact table including; consultants, contractors, manufacturers and vendors.
- .3 For consultants, contractors, and vendors, only employer emails and phone numbers shall be listed; no personal contact information shall be included.
- .4 For manufacturers, only generic company emails/phone numbers shall be listed; no personal information shall be included on the Contact 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.

.5 The Contact table on the Project Info Form shall be populated as follows:

| Col. | Field Name | Entry Format        | R   | Description  |
|------|------------|---------------------|-----|--|
| A    | EMAIL      | Manual Entry        | 1,2 | Each Contacts respective email address.              |
| B    | CATEGORY   | Drop-down selection | 1,2 | Selection from "Contact Category" pick list.         |
| C    | COMPANY    | Manual Entry        | 1,2 | Each Contacts respective company.                    |
| D    | PHONE      | Manual Entry        | 1,2 | Each contact's phone number, in format 000-000-0000. |

### 3. Building Tab

#### 3.1 Facility Table

- .1 The Facility Table shall be populated by the Consultant at Schematic Design, based on the information provided by the Province.
- .2 Only one Facility shall be captured in the Facility Table.
- .3 No additional cells/rows shall be inserted into the Facility table.
- .4 The Facility Table on the Project Info form shall be populated as follows:

| Field Name        | Entry Format   | R | Description   |
|-------------------|----------------|---|---|
| BUILDING ID       | Manual Entry   | 1 | Alberta Infrastructure's internal building ID number.   |
| RAPP ID           | Manual Entry   | 1 | Alberta Infrastructure's internal project ID number.  |
| FACILITY NAME     | Manual Entry   | 1 | Alberta Infrastructure's internal facility name.  |
| PROJECT NAME      | Manual Entry   | 1 | Alberta Infrastructure's internal project name.   |
| FACILITY CATEGORY | Drop-down list | 1 | Selection from "Facility Category" pick list.   |
| SITE ID           | Manual Entry   | 1 | Alberta Infrastructure's internal site number.  |
| FORM AUTHOR       | Manual Entry   | 1 | Contact who completed the Building Tab. Pick list references the Contacts table on the Contact Table. |
| AUTHORING DATE    | Manual Entry   | 1 | Date the Project Info Form was completed, in format YYYY-MM-DD.                                       |

#### 3.2 Floor Table

- .1 The Floor table shall be populated by the Consultant during Schematic Design.
- .2 The Contractor may add or update floors or levels that contain project assets or provide access to project assets.
- .3 All floors affected by the work shall be itemized in the Floors table.
- .4 The Floor sheet shall only contain the occupational level as shown on the Contract Documents. The Floor sheet shall not include any construction levels.
- .5 To allow location of assets placed under, outside, or above the building, "Foundation", "Site", and "Roof" Floors shall be created and listed as required.

- .6 The Floor Table is used to create the drop down selection list on the Space Table. Any floor not included in the Floor Table will not be available in this drop down selection.
- .7 Floor name shall be unique as shown on the Construction Documents.
- .8 The Floor table on the Building Form shall be populated as follows:

| Col. | Field Name  | Entry Format   | R | Description                                      |
|------|-------------|----------------|---|--|
| A    | NAME        | Manual Entry   | 1 | Name of each of the levels effected by the work. |
| B    | CATEGORY    | Drop-down list | 1 | Selection from "Floor Category" pick list.       |
| C    | ELEVATION   | Manual Entry   | 1 | Elevation of each level in geodetic metres.      |
| D    | DESCRIPTION | Manual Entry   | 1 | Written description of each of the levels.       |

### 3.3 Space Table

- .1 The Space table shall be populated by the Consultant during Design Development.
- .2 All Rooms affected by the work, regardless of disposition (New, Modified, Removal or No Change) shall be itemized in the Space Table.
- .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 Room numbers shall not be duplicated, including existing room numbers. List of existing room numbers to be provided by the Province and/or Client.
- .6 Existing Room Names to be consistent with Province's internal records. List of existing Room Names to be provided by the Province and/or Client.
- .7 The Space Table is used to create the drop down selection list on the Equipment Tab. Any space not included in the Space Table will not be available in this drop down selection.
- .8 The Space table on the Building Tab shall be populated as follows:

| Col. | Field Name    | Entry Format   | R | Description  |
|------|---------------|----------------|---|--|
| A    | ROOM NUMBER   | Manual Entry   | 1 | Unique number for each space as per the construction documents.              |
| B    | ROOM NAME     | Manual Entry   | 1 | Name for each space as per the construction documents.                       |
| C    | ROOM CATEGORY | Drop-down list | 1 | Selection from "Room Category" pick list                                     |
| D    | FLOOR         | Drop-down list | 1 | Floor on which the room can be found. Pick list references the Floors table. |
| E    | DISPOSITION   | Drop-down list | 1 | List indicating the status of each space                                     |
| F    | AREA          | Manual Entry   | 1 | Area of each room in square meters   |

## 4. System Tab

### 4.1 System Table

- .1 The System table shall be populated by the Consultant during Design Development.
- .2 In the event of approved project changes issued during construction, the Contractor shall complete updates in the AIC forms to reflect the issued changes.
- .3 The System Name shall follow the guidelines provided in the Maintainable Asset List.
- .4 The Project Team shall use the Maintainable Asset List, provided by the Province, as the basis of the required systems with modifications as required and in consultation with the Province.
- .5 The System table on the System Tab shall be populated as follows:

| Col. | Field Name  | Entry Format        | R   | Description                                |
|------|-------------|---------------------|-----|--|
| A    | SYSTEM NAME | Manual Entry        | 1,2 | Name of each system effected by the work.  |
| B    | CATEGORY    | Drop-down selection | 1,2 | Selection from "System Category" pick list |
| C    | DESCRIPTION | Manual Entry        | 1,2 | Written description of each of the systems |

## 5. Equipment Tab

### 5.1 Equipment Table

- .1 All items identified in the Maintainable Asset List, regardless of status (Moved, Replaced, New, or Removed) shall be captured in the equipment table.
- .2 The responsibility for the data entry in the equipment table is shared between the Consultant and Contractor, as follows:
  - .1 Each equipment tag/identifier shall be listed as a new row in the equipment table. Equipment rows and associated data (Columns A-F) are entered/updated as follows:
    - .1 All items in the Maintainable Asset List identified as design scope shall be entered/updated in the equipment table by the Consultant, as information is finalized in the contract documents.
    - .2 All items in the Maintainable Asset List identified as construction scope shall be entered/updated in the equipment table by the Contractor, as equipment is installed, removed, or moved throughout construction.
    - .3 In the event of approved project changes issued during construction, the Contractor shall complete updates in the AIC forms to reflect the issued changes.
- .3 Data available during construction (Columns G-N) shall be entered/updated by the Contractor for all rows in the equipment table. Refer to the table below for details.
- .4 Tag in the Equipment table shall be named uniquely and match the equipment tag shown on the Contract Documents/Shop Drawings.



- .1 Where equipment tag is not available/unique in the Contract Documents/Shop Drawing, items shall be tagged uniquely based on TypeTag-Space-Count.
- .2 Tags shall not be duplicated within any one building, including existing asset Tags. List of existing Tags to be provided by The Province and/or Client.
- .5 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.
  - .4 For any empty existing or new room number fields, an “N/A” value is required.
- .6 All empty/not applicable fields shall contain an “N/A” value.
- .7 The Type table on each of the Equipment Forms shall be populated as follows:

| Col. | Field Name             | Entry Format   | R   | Description  |
|------|------------------------|----------------|-----|--|
| A    | TAG                    | Manual Entry   | 1,2 | Unique ID number for each item as per the construction documents.                                |
| B    | DISPOSITION            | Drop-down list | 1,2 | Indicates the status of each listed item.  |
| C    | EXISTING ROOM NUMBER   | Drop-down list | 1,2 | Indicates installed location of each listed item. Drop down list populated from Spaces Table.    |
| D    | NEW ROOM NUMBER        | Drop-down list | 1,2 | Indicates installed location of each listed item. Drop down list populated from Spaces Table.    |
| E    | CATEGORY               | Drop-down list | 1,2 | Selection from “Equipment Category” pick list  |
| F    | SYSTEM                 | Manual Entry   | 1,2 | Indicates the system on which the item is installed. Drop down list populated from System Table. |
| G    | VENDOR                 | Manual Entry   | 1,2 | Vendor for each listed item. Drop down list based on Contact Table.                              |
| H    | MANUFACTURER           | Manual Entry   | 1,2 | Manufacturer of the specified equipment type.  |
| I    | MODEL #                | Manual Entry   | 1,2 | Model Number as it appears on the manufacturer tag/plate affixed to each item.                   |
| J    | SERIAL #               | Manual Entry   | 1,2 | Serial Number as it appears on the manufacturer tag/plate affixed to each item.                  |
| K    | INSTALL DATE           | Manual Entry   | 1,2 | Date of installation, in format YYYY-MM-DD   |
| L    | WARRANTY (PARTS/LABOR) | Manual Entry   | 1,2 | Duration of warranty of parts and labor, in years  |
| M    | WARRANTY START         | Manual Entry   | 1,2 | Date of warranty start, in format YYYY-MM-DD   |
| N    | REPLACE. COST          | Manual Entry   | 1,2 | MSRP cost to replace the equipment, in CAD   |

## 6. Document Tab

### 6.1 Document Table

- .1 The Document table shall be populated/updated by the Contractor throughout the project construction 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 Manuals
  - .3 Warranties
  - .4 Reports
  - .5 Registrations
  - .6 Certificates
  - .7 Permits
- .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:

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

## 7. 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.