|  |  |  |
| --- | --- | --- |
| **Georgia Tech BIM Execution Plan Template** | | February,  2022 |
| These BIM Requirements apply to Georgia Institute of Technology A/E/C selections advertised after November 1, 2020. BIM methodology is required for all construction projects.  **Issue Notes:**  *This document supersedes the “Georgia Tech BIM Requirements & Guidelines for Architects, Engineers and Contractors” BIM guidelines 1.5, issued 2016. Previous versions were prepared by Applied Professional Services, LLC.* | Version 2.1 | | |

# 

# Agreement

By signature below, this BIM Execution Plan is herewith adopted and incorporated into the Agreement, dated \_\_\_\_\_\_\_\_\_, for Professional Design Services between \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and Georgia Tech.

Owner Date

Architect Date

Construction Manager Date

Structural Engineer Date

Mechanical Engineer Date

Electrical Engineer Date

Plumbing Engineer Date

Additional Party as Needed Date

Additional Party as Needed Date

# Overview

The intent of this BIM Execution Plan is to provide a framework that will let the owner, architect, engineers, and construction manager deploy building information modeling (BIM) technology and best practices on this project faster and more cost-effectively. This plan delineates roles and responsibilities of each party, the detail and scope of information to be shared, relevant business processes and supporting software. *The BEP will be updated at each design phase and at the onset of construction.* ***All text that is RED is for illustrative purposes only, and should not be construed as a formalized response to this execution plan. Items in red are for reference only; items in RED should be deleted and/ or replaced with relevant project information.***

# Project Initiation

This section defines the Core Collaboration Team, the project objectives, project phases, and overall communication plan throughout the project’s phases.

## Project Information

|  |  |
| --- | --- |
| Project Name: |  |
| Project Number: |  |
| Project Address: |  |
| Project Description: |  |
| Building Number: |  |

## Project Goals and Objectives

***List all project goals and objectives below. Should reflect goals in the OPR.***

|  |  |  |  |
| --- | --- | --- | --- |
| Project Goal | Objective | Achieved if | Project Timeframe |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## BIM Use Cases

OPR

BIM Kick-Off

Programming and Program Validation

Cost Estimating

Surveys: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Existing Conditions

Laser Scanning-Design:\_\_\_\_\_\_\_\_

Design Model

Site Design

Structural Analysis

Energy Information Model & Assessment

Embodied Carbon/Life Cycle Assessment

Interference Detection (Design)

Construction Model

Laser scanning-construction (As-Builts)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Scheduling/Sequencing & Site Management

Collision Detection

COBie (Construction Operations Building Information Exchange)

Con-current As-Built Models

Facilities Management Model (FMM)

Facilities Management Set (FMS)

Facilities Management As-Built (FMA)

Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## BIM Core Team

***List all stakeholders that form the project management team below. These individuals share in the responsibility of providing oversight pursuant to validation of the project program, cost and value.***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Role/Title | Name | Company | Email | Phone |
| GT Proj Manager |  |  |  |  |
| GT BIM Manager |  |  |  |  |
| Facilities Manager |  |  |  |  |
| GT Database Spec. |  |  |  |  |
| Cx Agent |  |  |  |  |
| Design BIM Mngr. |  |  |  |  |
| Construction BIM Mgr |  |  |  |  |

## 2.4a Design Discipline Modeling Team

***List all stakeholders that form the project management team below. These individuals share in the responsibility of providing oversight pursuant to validation of the project program, cost and value.***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Discipline | Name | Company | Email | Phone |
|  |  |  |  |  |
|  |  |  |  |  |

## 2.4b Construction Discipline Modeling Team

***List all stakeholders that form the project management team below. These individuals share in the responsibility of providing oversight pursuant to validation of the project program, cost and value.***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Discipline | Name | Company | Email | Phone |
|  |  |  |  |  |
|  |  |  |  |  |

## Project Phases / Milestones

***This section identifies all stakeholders involved in completing project phase milestones. Start and completion dates will correspond with the approved project schedule. Stakeholders involved shall be the contributing parties assigned to those tasks within the phases for the project.***

|  |  |  |  |
| --- | --- | --- | --- |
| Project Phase / Milestone | Estimated Start Date | Estimated Completion Date | Project Stakeholders Involved |
| Programming/ Pre-Design Phase |  |  |  |
| Schematic Design Phase |  |  |  |
| Design Development Phase |  |  |  |
| Construction Documents Phase |  |  |  |
| Agency Review & Bidding Phase (Contractor) |  |  |  |
| *Construction Phase* |  |  |  |
| *75% Construction*  *Facilities Management Set* |  |  |  |
| *Facilities Management Model*  *Facilities Management As-Built* |  |  |  |
| Close-out (Design Team) |  |  |  |
| Close-out (Contractor) |  |  |  |

## Project Deliverables

***This section shall be used to assign authoring and review responsibilities for deliverables as well as to identify the format and software in which the deliverable will be submitted. Deliverables may be deleted in accordance with the Use Cases excluded above.***

***File naming convention for models shall be:***

*DISCIPLINE-Project\_Number-Building Number.rvt (example: ARCH-2009\_0001-001.rvt). Confirm with GT.*

## 2.6a Project Deliverables – Design

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Deliverable** | **Pre-Design** | **SD** | | **DD** | **CDs** | **Permit/Bidding** |
| ***OPR*** | Author:  Reviewer(s): | | | Format/Software:  File Name: | | |
| Comment: | | | | | |
| *Review* | *Review* | | *Review* | *Review* | *Review* |
| ***BEP*** | Author:  Reviewer(s): | | | Format/Software:  File Name: | | |
| Comment: | | | | | |
| *Review* | *Review* | | *Review* | *Review* | *Review* |
| ***Programming*** | Author:  Reviewer(s): | | | Format/Software:  File Name: | | |
| Comment: | | | | | |
| *Validation* | *Validation* | | *NA* | *NA* | *NA* |
| ***Space*** | Author:  Reviewer(s): | | | Format/Software:  File Name: | | |
| Comment: | | | | | |
| *Validation* | *Validation* | | *NA* | *NA* | *NA* |
| ***Survey*** | Author:  Reviewer(s): | | | Format/Software:  File Name: | | |
| Comment: | | | | | |
| *As needed* | *NA* | | *NA* | *NA* | *NA* |
| ***Existing Conditions*** | Author:  Reviewer(s): | | | Format/Software:  File Name: | | |
| Comment: | | | | | |
| *As needed* | *NA* | | *NA* | *NA* | *NA* |
| ***Architecture*** | Author:  Reviewer(s): | | | Format/Software:  File Name: ARCH- | | |
| Comment: | | | | | |
| *Massing Model* | *LOD 150* | | *LOD 200* | *LOD 300*  *Autocad DWG* | *LOD 300* |
| ***Site Model*** | Author:  Reviewer(s): | | | Format/Software:  File Name: SITE- | | |
| Comment: | | | | | |
| *Intent* | *LOD 150* | | *LOD 200* | *LOD 300* | *LOD 300* |
| ***Civil*** | Author:  Reviewer(s): | | | Format/Software:  File Name: CIVL- | | |
| Comment: | | | | | |
| *NA* | *LOD 150* | | *LOD 200* | *LOD 300* | *LOD 300* |
| ***Structural*** | Author:  Reviewer(s): | | | Format/Software:  File Name: STRC- | | |
| Comment: | | | | | |
| *Intent* | *LOD 150* | | *LOD 200* | *LOD 300* | *LOD 300* |
| ***MEP*** | Author:  Reviewer(s): | | | Format/Software:  File Name: MECH/ELEC/PLMB- | | |
| Comment: | | | | | |
| *Intent* | *Revised Summary* | | *LOD 200* | *LOD 300* | *LOD 300* |
| ***Specialty models*** | Author:  Reviewer(s): | | | Format/Software:  File Name: TCOM (Telecomm)/AVIS (AV)/STAN (Structural Analysis) | | |
| Comment: | | | | | |
| *NA* | *LOD 150* | | *LOD 200* | *LOD 300* | *LOD 300* |
| **Embodied Carbon/LCA** | Author:  Reviewer(s): | | | Author:  Reviewer(s): | | |
| Comment: | | | | | |
| Structure Analysis | | Exterior Skin  Analysis | Materials Inventory | Product selection/  specifications | Product selection/  specifications |
| ***Energy Budget and Analysis*** | Author:  Reviewer(s): | | | Format/Software:  File Name: ENRG- | | |
| Comment: | | | | | |
| *Energy Budget* | *(1) Updated Energy Budget (2) Preliminary model* | | *(1) Detailed model/analysis*  *(2) Updated energy cost report* | *(1) Detailed model/analysis*  *(2) Updated*  *energy cost report* | * + - 1. *Detailed*   *Model*  *(2) Updated energy cost report* |
| ***Interference detection*** | Author:  Reviewer(s): | | | Format/Software:  File Name: | | |
| Comment: | | | | | |
| *NA* | *Level 1* | | *Level 2* | *Level 3* | *NA* |
| ***Cost*** | Author:  Reviewer(s): | | | Format/Software:  File Name: COST- | | |
| Comment: | | | | | |
| *Comparative Analysis* | *Sq Ft Estimate* | | *Systems + Energy cost estimates* | *Quantity Cost Estimate* | *NA* |
| ***COBie*** | Author:  Reviewer(s): | | | Format/Software:  File Name: | | |
| Comment: | | | | | |
| *Asset Group Selection* | *Asset Group Review* | | *Template &*  *Model Review* | *Template Export*  *Model Review* | *Template Export*  *Model Review* |
| ***Other*** | Author:  Reviewer(s): | | | Format/Software:  File Name: | | |
| Comment: | | | | | |
|  |  | |  |  |  |

## 2.6b Project Deliverables – Construction

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Deliverable** | **Pre-construction** | **Cosntruction** | **75%** | | **Closeout** |
| *OPR* | Author:  Reviewer(s): | | | Format/Software:  File Name: | |
| Comment: | | | | |
| *Review* | *Review* | *Review* | | *Review* |
| *BEP* | Author:  Reviewer(s): | | | Format/Software:  File Name: | |
| Comment: | | | | |
| *Review* | *Review* | *Review* | | *Review* |
| *Design Models* | Author:  Reviewer(s): | | | Format/Software:  File Name: *(See above or duplicate if different)* | |
| Comment: | | | | |
| *LOD 300* | *LOD 300*  *As-Built* | *LOD 300*  *As-Built* | | *LOD 300*  *As-Built* |
| *Construction Models* | Author:  Reviewer(s): | | | Format/Software:  File Name: CNST- | |
| Comment: | | | | |
| *LOD 400* | *LOD 450*  *As-Built* | *LOD 500*  *As-Built* | | *LOD 500*  *As-Built* |
| *Fabrication Models* | Author:  Reviewer(s): | | | Format/Software:  File Name: | |
| Comment: | | | | |
| *LOD 400* | *LOD 450*  *As Built* | *LOD 450*  *As Built* | | *LOD 450*  *As Built* |
| *Clash Detection* | Author:  Reviewer(s): | | | Format/Software:  File Name: | |
| Comment: | | | | |
| *Report/Review* | *Bi-weekly report* | *As Needed* | | *NA* |
| *COBie* | Author:  Reviewer(s): | | Format/Software:  File Name: | | |
| Comment: | | | | |
| *LOD 400* | *LOD 450* | *Facilities Management Export* | | *Facilities Management As-Built* |
| *Facility*  *Management*  *Model* | Author:  Reviewer(s): | | | Format/Software:  File Name: FMM- | |
| Comment: | | | | |
| *NA* | *NA* | *LOD 500* | | *LOD 500* |
| *Other* | Author:  Reviewer(s): | | Format/Software:  File Name: | | |
| Comment: | | | | |
| *NA* | *NA* | *NA* | | *NA* |

# Modeling Information

Advance planning around which models will need to be created during the different phases of the project, which will be responsible for updating models and distributing them, and predetermining the content and format of models as much as possible, will help your project run more efficiently and cost-effectively during every phase

## 3.1 Project Base Point

Each team shall maintain the following coordinates for the Project Base Start Point and Survey Point:

Project Base Point: *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Survey Point: *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

The Architectural Design Model will be issued with these points already located, along with a Model group of crosshairs corresponding to each point.

Do not move or alter these points or any reason!

## Project Phases

1. The Architectural and Structural models will utilize phasing as follows:
   1. Existing
   2. Demolition
   3. New Construction
2. It should not be necessary for other disciplines to utilize phasing in their models.

## Building Levels

|  |  |  |
| --- | --- | --- |
| Building Level Name | Model Level Name | Elevation |
| ***First Floor Level*** | ***1*** | *0’-0”* |
|  |  |  |
|  |  |  |

## Model Element Rules & Completeness of design.

All physical building elements within the project are to be modeled (except those clearly defined and excluded in the MEA Table) and are to represent the full and complete design of each level and element of the building. For example, if a single level of a building is identical to another level, each level is to be distinctly and completely represented in the Design and Construction models. The same applies to identical partial floor layouts.

### 3.4.1 Precision and Dimensioning

Models should include all appropriate dimensioning as needed for design intent, analysis, and construction. With the exception of the exclusions listed below, the model will be considered accurate and complete. In the table below, enter which items’ placement will not be considered entirely accurate and should not be relied on for placement or assembly.

|  |
| --- |
| Items that Will Not Be Considered Accurate for Dimensioning or Placement |
| Architectural – |
| MEP – |
| Civil – |
| Construction – |
| Food Service – |
| Structural – |

### 3.4.2 Modeling Object Properties

The level of property information in the modeling objects and assemblies depends on the types of analysis that will be performed on the model. See Analysis Models Tablefor the types of analysis that will be performed.

Items to be modeled will be in accordance with GT “Architecture and engineering Design Standards for Building Technology (GT – Yellow Book)”.

Model and model component COBie data per the GT BIM Requirements will be estimated and agreed upon in the BIM Component Checklist issued during Preliminary Design. The team will be required to add information to the BIMs that will add value to GT’s facility management systems. In support of COBie, the Project Team is required to utilize attributes within the GT BIM template to assist in generation of required information for contribution to the GT FM data structure. See Appendix 7.2 of the GT BIM Requirements. See Supplementary Document “20121031\_bim component check list.pdf” for a list of agreed upon elements that need to be tracked using OmniClass identifiers and COBie data spreadsheets.

### 3.4.3 Modeling Exclusions

***Exclusions: List the objects excluded from the model in the table below.***

|  |
| --- |
| Items that Will Be Excluded from the Model |
| Architectural – |
| MEP – |
| Civil – |
| Construction – |
| Food Service – |
| Structural – |

Size: Any object smaller than [1”]will not be included in the model.

## Design Model Ownership of Elements

|  |  |  |
| --- | --- | --- |
| Model Element | Discipline Owner | Discipline Usage |
| Grids | Architectural | A, M, P & E – Copy Monitor |
| Columns | Structural | A, M, P & E - Linked |
| Exterior | Architectural | S, M, P & E – Linked |
| Ramp slabs/stair steps & stair landing slabs | Architectural | S, M, P & E - Linked |
| Floor slabs | Structural | A, M, P & E – Linked |
| Foundation walls- retaining, stair/ramp walls, entry foundations | Structural | A, M, P & E – Linked |
| Roof deck (floor) | Structural | A, M, P & E – Linked |
| Roof finish (floor) | Architectural | M, P & E - Linked |
| RTU curbs | Mechanical | M, P & E - Linked |
| Mechanical curbs | Mechanical | A, P & E - Linked |
| Plumbing Fixtures | Architectural | A, S, M, & E - Linked |
| Mechanical Fixtures | Mechanical | A, P & E - Linked |
| Light Fixtures | Electrical | A - Linked |
| AV/IT Equipment | AV/IT | A, M, P, E - Linked |

### COBie: Model Attribute Data

The level of property information in the modeling objects and assemblies depends on the types of analysis that will be performed on the model.

See Section 4.3.1.1 of the GT BIM Requirements for COBie data requirements. The team is expected to understand data requirement for all phases of the work, and should show how data capability requirements influence the planning and collaboration for this project. Diagramming expected and anticipated events, solving workflow dynamics for the collaborative team will address the intent of the BIM project.

The table below shows all of the element properties included in the BIM Template. The team responsible for each parameter of each element is highlighted below. This table is intended to be edited by the team as part of this BEP on a project by project basis and agreed upon by all parties.



# Detailed Modeling Plan

### Programming/ Pre-Design Phase

#### Objectives: Provide initial design based on conceptual parameters established by the owner, ensure that code and zoning requirements meet project objectives, and establish a 3D reference point of model coordination. Provide Program of Requirements and all space considerations for reference in the model.

#### Model Roles: A model may or may not take shape during the Conceptualization / Program of Requirements phase. If a model is created, its role will be to depict the visual concept and general layout of the project along with space requirements.

#### Responsibilities: The architect’s designated model manager will establish a baseline model to be used as the basis for other models. During the Conceptualization / Program of Requirement phase, the model managers from all parties will establish modeling standards and guidelines.

### Schematic Design Phase

#### Objectives: Provide spatial design based on input from the Conceptualization / Program of Requirement phase; provide initial design for building system and attributes including architectural, structural, and MEP; identify initial coordination issues between building systems; receive input from suppliers and fabricators regarding system cost, placement, fabrication and scheduling.

#### Model Roles: The Architectural model will show the general design and layout of the building structure and act as the baseline for all other subsystem designs, such as MEP and Structural models. The subsystem designs will be used to show the initial selection and layout of building components. The Architectural model and Consulting Engineers’ model will be used to inform the Energy Models. Refer to Georgia Tech’s Yellow Book for Energy modeling requirements.

#### Responsibilities: Once the baseline conceptual structure has been created, the architect’s model manager will send the model to the sub-consultants so they can develop their designs. The consulting engineers’ designated model managers will audit and deliver the completed models to the architect’s model manager. The architect’s model manager will review the models to ensure compliance with the phase requirements. Once the models meet the requirements, the architect’s model manager will link or combine cross-disciplinary models. The architect’s model manager should coordinate with the consulting engineers’ model managers to eliminate duplicate or redundant objects.

### Preliminary Design Phase

#### Objectives: Provide final design of building and building systems; resolve coordination issues between building systems; provide a Construction model capable of analyzing schedule, cost, and constructability.

#### Model Roles: The Architectural model will continue to act as the baseline for all other subsystem designs. The subsystem designs will be modified accordingly to represent the enhanced design.

#### Responsibilities: The consulting engineers’ model managers will use the Architectural model to revise and complete their designs. Once the models are complete, the consulting engineers’ model managers will deliver their models to the architect’s model manager. The architect’s model manager will review the models to ensure compliance with the phase requirements. The architect’s model manager will provide the construction manager’s model manager with the Architectural model and the Consulting Engineers’ models.

### Construction Documents Phase

#### Objectives: Finalize design of the building and all building systems, prepare documentation for agency review, and provide construction modeling that highlight constructability, trade coordination, and fabrication.

#### Model Roles: All design models will be used to reflect the design. The models will then be used to generate the contract documents. The Construction model will be used primarily for estimating, scheduling, and constructability analysis.

#### Responsibilities: The architect and engineer's model managers will prepare contract documents for agency review based on the Design Intent models.

### Agency Review & Bidding Phase

#### Objective: Revise Design Intent models based on agency feedback on all models.

#### Model Roles: The design models will be adjusted to reflect agency feedback. The Construction model will be enhanced and further used for estimating, scheduling, construction sequencing, trade coordination, and constructability analysis.

#### Responsibilities: The architect’s model manager will communicate agency comments back to the design team. The consulting engineers’ model managers will revise their design models accordingly and submit them back to the architect. The architect’s model manager will provide the construction manager’s model manager with the Architectural model and the Consulting Engineers’ models.

### Construction Phase

#### Objectives: Update Architectural and Consulting Engineers’ models based on submittals, RFIs, or owner-directed changes; maintain the Construction model based on construction activities. The construction team will submit RFIs and submittals through the collaborative project management system.

#### Model Roles: The Architectural and Consulting Engineers’ models will be revised throughout construction, based on owner directives and As Built comments. The models will always reflect the revised contract documents. The Construction model will be used for scheduling analysis, construction sequencing, and trade coordination.

#### Responsibilities: The architect’s model manager will work with their consulting engineers to answer the RFIs and submittals and adjust the models accordingly. The construction manager’s model manager will update the Construction model and will work with the architect to develop the Architectural and Consulting Engineers’ models.

## Facility Management- FM

Objective: Use the Architectural and Consulting Engineers’ models for facility management, with the possibility of use in ongoing operations. Georgia Tech Operations and Maintenance staff will use data from the Architectural Model and the General Contractor’s field data collection tools to populate FM databases. A set of objects or Revit Families in the model shall have COBie attributes for tracking data.

Model Roles: The Architectural and Consulting Engineers’ models will be used to represent the actual assembly of the building from construction.

Responsibilities: The architect will deliver the models at the end of the project to the owner.

### Close Out (Design Team)

#### Objective: Use the Architectural and Consulting Engineers’ models for facility management, with the possibility of use in ongoing operations.

#### Model Roles: The Architectural and Consulting Engineers’ models will be used to represent the actual assembly of the building from construction.

#### Responsibilities: The architect will deliver the models at the end of the project to the owner.

### Close Out (Contractor)

#### Objective: Use the Architectural and Consulting Engineers’ models for facility management, with the possibility of use in ongoing operations.

#### Model Roles: The Architectural and Consulting Engineers’ models will be used to represent the actual assembly of the building from construction.

#### Responsibilities: The contractor will deliver the models at the end of the project to the owner.

# Concurrent As-Built Modeling

As-built modeling will be a collaborative effort between the Architect and consultants and the construction team. During the construction process, the design team will incorporate changes triggered by requests for information (RFIs), architect’s supplemental instructions (ASIs) and change orders in into the Architectural and Consultant models. At specified dates during the construction process, the construction team will provide the design team with necessary changes due to shop drawings, coordination drawings and change orders. The design team will then incorporate the changes reported by the construction team into the Architectural and Consultant models. The contractor will update all fabrication models and construction models based on as-built conditions. Any deviations from approved shop drawings should be recorded via RFIs and/or as-built models. Laser scanning may be used during the construction process to confirm and update as-built models.

### Construction Review Schedule

|  |  |  |
| --- | --- | --- |
| Event | Date | Parties involved |
| Construction Capture 1 |  | Construction team, Design Team, [Laser Scanning] |
| Construction Capture 2 |  | Construction Team, Design Team, [Laser Scanning] |
| Construction Capture 3 |  | Construction Team, Design Team, [Laser Scanning] |
| Construction Capture 4 |  | Construction Team, Design Team, [Laser Scanning] |

# Document Management

## Document Management System Requirements

A collaborative document management system will have to be researched and agreed upon prior to start of project. The requirements of the Collaborative Project Management system are:

* Be web-based or web-enabled—so all relevant, authorized project team members can remotely access it.
* Accommodate different permissions profiles for different project team members.
* Allow communication through either internal messaging or system-generated email.
* Include document management capability that lets the project team create a customized and permission-based folder structure, which offers upload, download, and version control capabilities.
* Include a viewer that allows the project team to view .dwg, .dgn, .plt, .dwf, .pdf, .tif, .jpg, .doc, and .xls files.
* Include construction management capabilities for the tracking of requests for information (RFIs), submittals, design review, meeting minutes, daily reports, issues, correspondence, and transmittals.
* Able to interact with the file folder structure in the document management section.
* Able to automatically accept raw data from the clash detection tool.
* Include bid management capability, and this bid management solution should allow the project team to post the contract drawings and specifications for viewing in the form of a Plan Room.
* Allow for cost management controls, and this cost management capability should include budgeting, contracting, change orders processing, and payments applications tracking.
* Allow the project team to run reports based on the information in the system.
* Allow for the workflow and routing throughout the document, construction and cost management components of the solution.

Selected Document Management system:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## Document Management Process

Once the management system has been selected, the *architect* will setup the site and set up all permissions for the site. The *architect* will lead a training session for the entire project team on how to use the site. The site will be maintained from the signing of this document until the occupation of the building.

*Describe how the management system is accessed, including necessary links, usernames and passcodes.*

*Describe the process and time frame for downloading materials.*

*Describe the notification process when materials are available on the site.*

*Describe any processes or standards or formatting required prior to uploading materials on to the site.*

*List any agreed upon file format requirements.*

*Describe Data-Transfer Process between Design and Construction Team*