

Task Ref	Asset Register Workbook Tab	Key responsibility	TASK ▼	STAGE ▶	0	1	2	3	4	5	6
					Strategic Definition	Preparation and Briefing	Concept Design	Spatial Coordination	Technical Design	Manufacturing and Construction	Handover
1	00 - Project information	CLIENT	> Populate the project information particulars, including the document control section. Link and load in a Uniclass Product (Pr) table and project master asset list to assist full workbook functionality. NB: A client-side Information Manager can support the completion of this and other client-related tasks.								
2		ALL	> Update the Project Document Control section if the primary workbook ownership changes during the project.								
3		ALL	> Workbook authors / contributors to populate the Project Document Revision section as updates are made to any sheet.								
4	01- Contents	ALL	> Read instructions thoroughly to familiarise yourself with the sheets used within the asset register. > Take cognisance of asset information grades, and their associated definitions.								
5	02 - Stakeholders lists	CLIENT	> Add design company names to Column B. NB: The client may have to advise the contractor on the relevant Operations Companies.								
6		CONTRACTOR	> Add Supplier company and any sub-contracted Installation company names to Columns C and D. > New companies and their sub-contractors may need to be added at different stages of the procurement process. > Some companies may need to be added to several columns. e.g. they are both a Supplier and Installer. > With the clients support input the Operations Companies names in column F.								
7	03A - O&M manual requirements	CLIENT	> Review the default operations and maintenance (O&M) manual requirements and confirm the project deliverables via Column A. > Use Column B to confirm the required information requirements for Building Standards completion certificate submission. > Confirm the responsible lead delivery parties against each information requirement via Column I. > Confirm the pre-handover training and demonstration requirements by the contractor via Column J. > Save and create an immutable record of the final sheet for archive / future reference purposes. NB: Any classification value adjustments should be in accordance with the Uniclass Project Management (PM) & System (Ss) tables adopted on the project. Refer to sheet 00.								
8	03B - COBie data requirements	CLIENT	> Review the default COBie data requirements and confirm the deliverables via Column D, followed by the assignment of the RIBA stages 3, 4 and 5 delivery parties via Columns E-G. > Save and create an immutable record of the final sheet for archive / future reference purposes. NB: The Column D 'YES' values for 'Type' , 'Component' and 'System' sections correspond with the reference values (Col A) in Sheet 04. Parties can be reassigned using the sheet drop-down picklists.								
9	04 - Asset information grades	ALL	> Use the drop down cell (5/B) to review individual grading definitions, copied from sheet 00.								
10		CLIENT	> Review the default data (yellow) and documentation (grey) deliverables for each grade (GRxx) and make any necessary project adjustments using the drop down cell function. > Save any table changes via the 'Save project changes' button. This will auto update the final sheet 07 AIR Register. > Create an immutable record of the final sheet for archive / future reference purposes. NB: Column A reference codes also correspond to sheet 07- AIR Register, Row 8, Columns I - CB. Default grade value changes are represented by darker cell colours.								
11	05 - Insert classifications table & quality check	CLIENT	> This sheet has been pre- loaded with the SFT master asset list for review with the facility/ asset management team at the project outset. > Agree an initial list of asset types to be included in the final asset register. > At the end of RIBA stage 3 export all product classification values from the design team BIM models and copy into Columns A & B for a quality check review. > Report any errors to the model originators for resolution in the native models. > Re- check for zero errors before saving the list for importing into Sheet 06.								
12		CONTRACTOR	> Repeat the above steps at the end of RIBA stages 4 and 5 to capture and check all new product classification values. > When zero errors are achieved, save the list for importing into Sheet 06. NB: The quality of the workbook and the final asset register is dependant on the quality of the Product (Pr) classification values added into this sheet. Please ensure the model originators correctly assign all (Pr) classification values to their project BIM elements. SFT have produced specific guidance and resources to support industry achieve this, which can be sourced from the SFT BIM portal.								

13	06 - Product responsibility matrix	CLIENT	<p>> Refer to the sheet 06 header workflow diagram which sets out a sequence of action steps (1-5) to be completed at each key project stage.</p> <p>> At the project outset review the pre-loaded master asset list and complete the steps up to Col J.</p> <p>> Confirm the products to be included in the asset register list using the Col G, Yes/ No cell drop-downs.</p> <p>> Repeat the above review process and steps at the end of RIBA stage 3. The main purpose is identify which of the design stage products will become maintainable assets and grade them accordingly.</p> <p>NB: The cell values in the 'Project Updates' (Col G-I) and 'Responsible Party Assignment' columns (J-M) are used to populate sheets 07 and 08.</p> <p>> Any new non-default products can be assigned values via the 'Project Updates' columns.</p>							
		CONTRACTOR	<p>> Complete the same action steps (1-5) at the end of RIBA stages 4 and 5, using re-imported and updated lists from sheet 05.</p> <p>> Confirm the products to be included in the asset register list using the Col G, Yes/ No cell drop-downs.</p> <p>> Any proposed default discipline or grade value changes (Col's H & I) should be agreed with the client team.</p> <p>> Assign Responsible Parties (columns K to M) using the column cell drop-downs, sourced from sheet 02.</p> <p>NB: The Product Group column (A) can be used to filter out batch product sets for responsible party assignment.</p>							
14	07 - AIR register	ALL	<p>> Following the successful completion of the previous sheet tasks, the AIR Register is auto-populated with the:</p> <ul style="list-style-type: none"> - list of project maintainable assets and their assigned grade values, - documentation and data deliverables for each product type, - assigned responsible parties who will deliver the asset information at key project stages. <p>NB: Header function buttons enable sheet filtering of the listed products, grades and responsible parties. A fully populated sheet 07 can be used to track and monitor the information delivery process up to project handover. It is possible to copy the final table values for this purpose.</p>							
15	08 - Asset maintenance frequency	CLIENT	<p>> The project maintainable asset list, associated gradings and are populated from sheet 06. Suggested maintenance task frequencies have been provided.</p> <p>> At the end of RIBA stage 4 review the project asset list and frequency values with the facility/ asset management team, make any necessary adjustments using the frequency key and drop-down cells. SFG20 codes can be added if available.</p> <p>> Support the contractor to complete the above tasks and table updates up to project handover. Operations companies names will need to added to sheet 02, to populate assignment cells on sheets 06-08.</p> <p>NB: Timely completion of this sheet will support the planning and availability of a facility maintenance calendar at the handover stage. It is possible to copy the final table values for this purpose.</p>							
		CONTRACTOR	<p>> Work with the client to update and finalise the table values for the maintainable asset list.</p> <p>> Ensure the supplier companies are contracted to provide the correct manufacturer maintenance frequency values for their relevant assets.</p> <p>> If applicable, review any provided SFG 20 codes (Col L) with the client and their operations company/ companies.</p> <p>> Provide a completed, accurate list and table values to the client and operator at project handover.</p>							

WORKBOOK SHEET COLOUR KEY	PICKLIST
Client review/ task input	CLIENT
All Party review/ task input	ALL
Contractor review/ task input	CONTRACTOR
Client & Contractor review/ task input	X