

## Attachment 1 - Instructions and Procedures

### Instructions

Each region may implement their own workflow and responsibility chain for “who” does the below.

Loading As Built Drawings in CFR

Upon receipt of lease as-built drawings:

1. Log into CFR on the PBS Portal.
  - If needing first-time access, roles must be requested via UIMS. Each region has its own CFR\_Rxx\_USER role, so up to 11 may be needed if the person requesting needs to upload to all regions.
2. Determine if the leased building exists in CFR.
  - Locate the building by searching:
    - Select "Advanced Search" from the "Search" box in the upper right corner of the screen.
    - Select "Folders" from the "Search Context" menu.
    - Type the 6-digit Location Code (e.g. TX0224) into the "Name" field; then click the "Search" button.
    - If no results are found, proceed to step 3; otherwise step 4.
  - Locate the building by browsing:
    - Navigate to the regional site in which the building exists.
    - Select "Document Library" in the upper right corner of the screen.
    - Navigate to the state in which the building exists.
    - Ensure that the sort order is set to "Name" and the sort order to "Ascending".
    - Paginate through 300 buildings at a time to identify where the targeted building should exist.
    - If no results are found, proceed to step 3; otherwise step 4.
  - Create the leased building if it does not yet exist.
  - Contact the Building Information Modeling (BIM) Manager corresponding to the region in which the building should exist (see attached).
  - Request that the BIM Manager create the target building folder.
  - Once confirmation of building folder creation is received from the BIM Manager, repeat step 2.
3. Create a target folder for the files:
  - Click on the target building folder (e.g. TX0224).
  - Click on the PENDING folder.
  - Create a folder named "AS-BUILTS", if one does not yet exist.

4. Upload the file(s) provided by the lessor into the "AS-BUILTS" folder. Drag-and-drop of both files and folders is supported and is the easiest method.
5. Set properties on each file:
  - Primary Location: the 6-digit Location Code that is most closely associated with the document.
    - The location Name, Ownership, Status, Address, Facility Code and Facility Name will automatically populate from REXUS.
  - File Name: populated with the name of the file as loaded, but may be adjusted if necessary.
    - In the case of drawings, the file name should not be modified.
  - File Title: short, meaningful text that helps to provide specific information about its contents.
    - In the case of drawings, the file title should match the Title in the drawing's "title block".
  - Timeframe: should be set to "Present Conditions" for as-built drawings.
    - The Primary Context, Title and Year will automatically populate.
  - Sub-Context and Title: should be left blank for as-built drawings.
  - Lifecycle Stage: should be set to "Record Documents" for as-built drawings.
  - Document Type: should be set to "Drawing" for as-built drawings.
    - If documents represent other kinds of documents, such as Specifications or Narratives, their corresponding Document Type can be selected instead.
  - Sheet Type: should be set to "Plan" for as-built drawings.
  - Plan Type: should be set to "Architectural Plan" for as-built drawings.
    - If documents represent other kinds of plans, such as Electrical Plans or Site Plans, their corresponding Plan Type can be selected instead.
  - Disciplines: Architectural should be selected for as-built drawings. Applicable disciplines should be selected for all documents.
  - Building Levels: select the levels that are most closely associated with the as-built drawings. Select one, multiple or all levels - or simply leave the levels unselected.
    - Drawings typically represent one building level at a time.
    - BIM files typically represent all building levels.
  - Program Association: select an affiliated program if applicable (e.g. Art in Architecture, Historic, UFAS).
  - Description: Lease Number and Project Number plus any other pertinent information about the file that would aid a CFR user in finding or understanding file contents.
  - An example of a typical file property sheet is shown below:

Edit Properties: A-101.DWG

\* Required Fields

Primary Location: \* VT0801 ?

Name: LPOE, NORTON

Ownership: Federal

Status: Active

Address: STATE ROUTE 114, NORTON, VT 05907

Facility Code: VTBN

Facility Name: LPOE, NORTON

File Name: \* A-101.DWG ?

File Title: First Floor ?

Timeframe: \* Present Conditions ?

Primary Context: \* MASTER ?

Title: Master models and drawings ?

Year: ?

Sub-Context: ?

Title: ?

Lifecycle Stage: \* Record Documents ?

Document Type: \* Drawing ?

Sheet Type: Plan ?

Plan Type: Architectural Plan

**Disciplines**

Architectural <input checked="" type="checkbox"/>	Landscape <input type="checkbox"/>
Civil <input type="checkbox"/>	Mechanical <input type="checkbox"/>
Distributed Energy <input type="checkbox"/>	Plumbing <input type="checkbox"/>
Electrical <input type="checkbox"/>	Process <input type="checkbox"/>
Equipment <input type="checkbox"/>	Resource <input type="checkbox"/>
Fire Protection <input type="checkbox"/>	Structural <input checked="" type="checkbox"/>
General <input type="checkbox"/>	Survey/Mapping <input type="checkbox"/>
Geotechnical <input type="checkbox"/>	Telecommunications <input type="checkbox"/>
Hazardous Materials <input type="checkbox"/>	Other Disciplines <input type="checkbox"/>
Interiors <input type="checkbox"/>	

Building Levels: - ALL - ?

- Basements
- Ground
- Lower Levels
- Mezzanines
- Penthouses
- Roofs
- 001 First
- 002 Second
- 003 Third
- 004 Fourth
- 005 Fifth

Program Association: - Unspecified -

Description:

6. Notify the BIM Manager (or designated regional contact) that the files are ready for review and movement into Present Conditions. CFR Contacts are located [here](#).