

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: [Redacted] ?

Year: [Redacted] ?

Sub-Context: [Redacted] ?

Title: [Redacted]

Lifecycle Stage: * Record Documents ?

Document Type: * Drawing ?

Sheet Type: Plan ?

Plan Type: Architectural Plan

- Landscape
- Mechanical
- Plumbing
- Process
- Resource
- Structural
- Survey/Mapping
- Telecommunications
- Other Disciplines

- #### Disciplines
- Architectural
 - Civil
 - Distributed Energy
 - Electrical
 - Equipment
 - Fire Protection
 - General
 - Geotechnical
 - Hazardous Materials
 - Interiors

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- Building Levels:
- ALL -
 - Basemen
 - Ground
 - Lower Le
 - Mezzanin
 - Penthous
 - Roofs
 - 001 First
 - 002 Seco
 - 003 Third
 - 004 Fourt
 - 005 Fifth

Program Association: - Unspec

Description:

[Redacted]

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](#).