



Operations and Maintenance Manual



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Last Updated: 8/19/2024

Purpose

This standard procedure outlines the expectations and deliverables associated with each step in the Operations and Maintenance Manual Process. Operations and Maintenance manuals are essential for ensuring the efficient, safe, and compliant operation and maintenance of a commercial building. They support the longevity of building systems, assist in training staff, and serve as a critical resource for both daily operations and future modifications.

Overall, this process captures:

- Operations and Maintenance Manual Content
- Procore Submittal Logging (O&M Documents)
- Project Specific O&M Format (Do not assume)
- Warranty & Guarantee Date
- Procore Submittal Export
- Consultant Review and Submission to Project Owner

1 Procedures

1.1 Operations and Maintenance Manual (O&M) Contents

Operations and maintenance manual content is specified in the individual Specifications Sections. The operations and maintenance submittals should be reviewed at the time of the section review. When processing submittals (shop drawings and product data) for a trade and specification section the associated Operations and Maintenance documents should be included and reviewed with the complete submittal package.

1.2 Procore Submittal Logging (O&M Manual)

To ensure compliance with the contract documents review the Project Specification and identify all submittals required for the project.

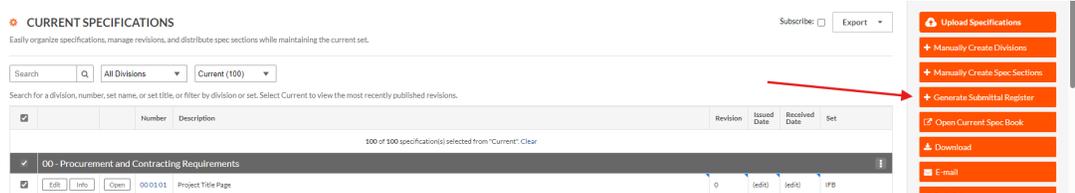
Procore includes an automated search function to assist with this process. The Procore tool will review the project specification for key words



Operations and Maintenance Manual

Last Updated: 8/19/2024

associated with standard submittals. The team then reviews, procures selections and creates a submittal package and submittal to be tracked through the review process.



Whether through Procore or other functions the submittal requirements listed in the project Specification are a contractual obligation and must be provided unless otherwise altered through written instruction.

The following key words can be used when manually searching the specification for submittals related to Operations and Maintenance manuals

- Submittal, submit
- Shop Drawing
- Sample
- Extra Material
- Product Data
- Maintenance, Maintenance Data, Maintenance Instructions
- Cleaning, Cleaning Instructions
- Warranty
- Guarantee

1.3 Project Specific O&M Manual Format

The required format for the O&M Manual will be defined in the Project Specification in Division 01 General Requirements.

The specification will define the acceptable format for submission. An indexed electronic file is becoming a commonly accepted format in lieu of individual binders and hard copy files. Each project will have a specific index and layout required. Where none exists the following is a typical standard that can be followed:



Operations and Maintenance Manual

Last Updated: 8/19/2024

- Table of Contents

- Directory
 - Contact list for the project
 - Identify key contacts
 - Identify emergency contacts

- Indexed section for each applicable specification section.

- Within each indexed section include the following subsections.
 - Warranty
 - Product Data
 - Maintenance Instructions
 - Shop Drawings

Not every specification section will include content required for submittal or as part of the O&M Manual.

1.4 **Warranty and Guarantee Dates**

Unless specifically altered through formal instruction the warranty date for the project including all subcontractor warranties is the date of substantial performance.

The O&M Manual should be created and ready for submission prior to Substantial Performance creating an issue with collecting warranties. To address this challenge warranties can be collected early with the warranty date listed as “the date of substantial performance”. If this option is not accepted, collect draft warranties to allow for submission for consultant review. Identify the warranties that require update and replace those with the final warranty when received.

Track all warranties as submittals in Procore following the standard submittal process.

1.5 **Procore Submittal Log Export**

Please consult the following link for details on how to export the Procore



Operations and Maintenance Manual

Last Updated: 8/19/2024

submittal log:

[How to Export a Procore Submittal Log](#)

1.6 Consultant Review and Submission to Project Owner

Prepare the draft O&M Manual prior to project closeout and commissioning. Most project specifications will require a draft O&M to be submitted prior to equipment and systems demonstration and training. This allows for the project team to reference the Operations and Maintenance documents when training the building operator.

Prior to substantial performance and as a condition of substantial performance the O&M Manual in final format should be submitted to the consultant team for review. Follow up with the consultant on the Owner's behalf to ensure the Owner receives the final document.

END OF DOCUMENT

Revision History		
Version No.	Effective Date	Description
1	August 19, 2024	Original Document Created by Justin Estby