SECTION 01 7823

OPERATION AND MAINTENANCE DATA

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LANL MASTER SPECIFICATION

Edit this template for each project. In doing so; Specifier must add Project-specific requirements. Brackets are used in the text to indicate where text must be edited or design information provided by the Specifier. Once the choice is made or text provided, remove the brackets. This specification must also be edited to delete requirements for materials, systems, processes, items, or designs that are not included in the Project and Specifier's notes such as these. To seek a variance from requirements in the specifications that are applicable, contact the Engineering Standards Manual Architectural [POC](http://engstandards.lanl.gov/POCs.shtml). Please contact POC with suggestions for improvement as well.

When assembling a specification package, include applicable specifications from all Divisions, especially Division 1, General requirements. ·

Specification developed for ML-4 projects. For ML-1, 2, and 3 applications, additional requirements and independent reviews should be added if increased confidence in procurement or execution is desired; see ESM Chapter 1 Section Z10 Specifications and Quality sections.

This section may reference other sections that are future LANL Masters.  Until they exist, the design agency shall either delete these anticipatory references or create a project spec on the topic (whichever is more appropriate for the project).

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PART 1 GENERAL

1. SECTION INCLUDES
   1. Section includes administrative and procedural requirements for preparing operation and maintenance manuals, including the following:
2. Operation and maintenance documentation directory.
3. [Emergency manuals.]
4. Operation manuals for systems, subsystems, and equipment.
5. Product maintenance manuals.
6. Systems and equipment maintenance manuals.
7. RELATED SECTIONS
8. Drawings and general provisions of the Contract, including General and Supplementary Conditions and other Division 01 Specification Sections, apply to this Section.
9. Section 01 3300, *Submittal Procedures* for submitting copies of submittals tor operation and maintenance manuals.
10. Section 01 7839, *Project Record Documents* for compliance with newly prepared record drawings.
11. [Section 01 9113, *General Commissioning Requirements* for verification and compilation of data into operation and maintenance manual.]
12. DEFINITIONS
    1. System: An organized collection of parts, equipment, or subsystems united by regular interaction.
    2. Subsystem: A portion of a system with characteristics similar to a system.
13. CLOSEOUT SUBMITTALS
14. Manual Content: Operations and maintenance manual content is specified in individual Specification Sections to be reviewed at the time of Section submittals. Submit reviewed manual content formatted and organized as required by this Section.
15. A/E of Record will comment on whether content of operations and maintenance submittals are acceptable.
16. Where applicable, clarity and update review manual content to correspond to revisions and field conditions.
17. Format: Submit operations and maintenance manuals in the following format:

[1. PDF electronic file: Assemble each manual into a composite electronically indexed file. Submit on digital media acceptable to A/E of Record.

1. Name each indexed document file in composite electronic index with applicable item name. Include a complete electronically linked operation and maintenance directory.
2. Enable inserted reviewer comments on draft submittals.]

[2. Three paper copies of final submittal. Include a complete operation and maintenance directory. Enclose title pages and directories in clear plastic sleeves. A/E of Record will return one copy.]

1. Initial Manual Submittal: Submit draft copy of each manual at least [30] <Insert number> days before commencing demonstration and training. A/E of Record will comment on whether general scope and content of manual are acceptable.
2. Final Manual Submittal: Submit each manual in final form prior to requesting inspection for Substantial Completion and at least [15] <Insert number> days before commencing demonstration and training. A/E of Record will return copy with comments.
   * + 1. Correct or revise each manual to comply with A/E of Records’ comments. Submit copies of each corrected manual within [15] <Insert number> days of receipt of A/E of Records comments and prior to commencing demonstration and training.

PART 2 PRODUCTS

1. SUSTAINABLE DESIGN REQUIREMENTS
2. Inspection Requirements: Describe inspection schedule and procedures necessary to promote durability of materials, components, and systems. Include the following:
3. Exterior: Inspection of exterior indicating points of potential concern for assessment of the following:
   1. Possible water ingress.
   2. UV degradation/damage
   3. Leaks, e.g. oil, coolant, refrigerants, etc.
   4. Damage or modifications to equipment enclosures
   5. Loose fasteners, door hardware, covers, etc.
   6. Blocking of ventilation openings
4. Equipment: Seasonal inspection of equipment. [Coordinate with Section 01 9133 *General Commissioning Requirements* or equivalent, when present.]
5. Environmental Requirements:
6. Identify environmentally preferable materials and systems incorporated into the Project. Include: product model; manufacturer's name, address, phone, and website; and local technical representative, if any.
   1. Verify that plastic products, including plastic components in assemblies, to be incorporated into the Project are labeled in accordance with ASTM D1972. Where products are not labeled, provide product data indicating polymeric information in Operation and Maintenance Manual.
      1. Products made from compositions containing a single filler, reinforcing or other modifying material in a concentration of more than one percent by mass shall be marked with the abbreviated term for the polymer, followed by a dash, then the abbreviated term or symbol for the additive, with its percentage by mass, arranged as shown in the example and set off with brackets. For example, a polypropylene containing 30 mass percentage of mineral powder use would be labeled: >PFMD30<
   2. Describe maintenance procedures associated with environmentally preferable materials and systems. Provide cleaning recommendations in accordance with ASTM E1971 and the approved Integrated Pest Management (IPM) plan.
7. Include potential environmental impacts of recommended maintenance procedures and materials.
8. Include potential indoor air quality impacts of the recommended maintenance procedures and materials.
9. Where the proposed maintenance procedures incorporate composting of plastics, assess the potential effect of each type of plastic to be included on the composting process in accordance with ASTM D6002.
   1. Identify [maintenance ·agreements] [take-back programs] [green leases] and appropriate contact information for the following:
10. Carpet
11. Ceiling Tile.
12. Office Equipment
    1. Material Safety Data Sheets: Include MSDSs as specified in individual Specification Sections.

[2. Develop environmental management programs for the facility as follows:

1. Waste management program: Develop in accordance with ASTM E1609. Maximize use of source reduction and recycling procedures.
2. IAQ management program: Provide for evaluation of indoor Carbon Dioxide concentrations in accordance with ASTM D6245. Provide for evaluation of VOCs (volatile organic compounds) in indoor air in accordance with ASTM D6345.
3. Water management program: Develop a water monitoring program for surface and ground water on the Project site in accordance with ASTM D5851 and consistent with the water management program utilized during construction operations.]
4. OPERATION AND MAINTENANCE DOCUMENTATION DIRECTORY
5. Directory: Prepare a single, comprehensive directory of emergency, operation, and maintenance materials, listing items and their location to facilitate ready access to desired information. Include a section in the directory for each of the following:
6. List of documents.
7. List of systems.
8. List of equipment.
9. Table of contents.
10. List of Systems and Subsystems: List systems alphabetically. Include references to operation and maintenance manuals that contain information about each system.
11. List of Equipment: List equipment for each system, organized alphabetically by system. For pieces of equipment not part of system, list alphabetically in separate list.
12. Tables of Contents: Include a table of contents for each emergency, operation, and maintenance manual.
13. Identification: In the documentation directory and in each operation and maintenance manual, identify each system, subsystem, and piece of equipment with same designation used in the Contract Documents.
14. REQUIREMENTS FOR [EMERGENCY], OPERATION, AND MAINTENANCE MANUALS
15. Organization: Unless otherwise indicated, organize each manual into a separate section for each system and subsystem, and a separate section for each piece of equipment not part of a system. Each manual shall contain the following materials, in the order listed:
16. Title page.
17. Table of contents.
18. Manual contents.
19. Title Page: Include the following information:
20. Subject matter included in manual.
21. Name and address of Project.
22. Name and address of LANL.
23. Date of submittal.
24. Name and contact information for Construction Subcontractor.
25. Name and contact information for Construction Subcontractor Manager.
26. Name and contact information for A/E of Record.
27. Name and contact information for Commissioning Authority.
28. Names and contact information for major consultants to the A/E of Record that designed the systems contained in the manuals.
29. Cross-reference to related systems in other operation and maintenance manuals.
30. Table of Contents: List each product included in manual, identified by product name, indexed to the content of the volume, and cross-referenced to Specification Section number in Project Manual.
31. If operation or maintenance documentation requires more than one volume to accommodate data, include comprehensive table of contents for all volumes in each volume of the set.
32. Manual Contents: Organize into sets of manageable size. Arrange contents alphabetically by system, subsystem, and equipment. If possible, assemble instructions for subsystems, equipment, and components of one system into a single binder.

[E. Manuals, Electronic Files: Submit manuals in the form of a multiple file composite electronic PDF file for each manual type required.

1. Electronic Files: Use electronic files prepared by manufacturer where available. Where scanning of paper documents is required, configure scanned file for minimum readable file size.
2. File Names and Bookmarks: Enable bookmarking of individual documents based on file names. Name document files to correspond to system, subsystem, and equipment names used in manual directory and table of contents. Group documents for each system and subsystem into individual composite bookmarked files, then create composite manual, so that resulting bookmarks reflect the system, subsystem, and equipment names in a readily navigated file tree. Configure electronic manual to display bookmark panel on opening file.]

[F. Manuals, Paper Copy: Submit manuals in the form of hard copy, bound and labeled volumes.

1. Binders: Heavy-duty, three-ring, vinyl-covered, loose-leaf binders, in thickness necessary to accommodate contents, sized to hold 8-1/2-by-11 -inch paper; with clear plastic sleeve on spine to hold label describing contents and with pockets inside covers to hold folded oversize sheets.
2. If two or more binders are necessary to accommodate data of a system, organize data in each binder into groupings by subsystem and related components. Cross reference other binders if necessary to provide essential information for proper operation or maintenance of equipment or system.
3. Identify each binder on front and spine, with printed title "OPERATION AND MAINTENANCE MANUAL," Project title or name, [and] subject matter of contents [, and indicate Specification Section number on bottom of spine]. Indicate volume number for multiple-volume sets.
4. Dividers: Heavy-paper dividers with plastic-covered tabs for each section of the manual. Mark each tab to indicate contents. Include typed list of products and major components of equipment included in the section on each divider, cross-referenced to Specification Section number and title of Project Manual.
5. Protective Plastic Sleeves: Transparent plastic sleeves designed to enclose diagnostic software storage media for computerized electronic equipment.
6. Supplementary Text: Prepared on 8-1 /2-by-11-inch white bond paper.
7. Drawings: Attach reinforced, punched binder tabs on drawings and bind with text.
8. If oversize drawings are necessary, fold drawings to same size as text pages and use as foldouts.
9. If drawings are too large to be used as foldouts, fold and place drawings in labeled envelopes and bind envelopes in rear of manual. At appropriate locations in manual, insert typewritten pages indicating drawing titles, descriptions of contents, and drawing locations.]
10. [EMERGENCY MANUALS
11. Content: Organize manual into a separate section for each of the following:
12. Type of emergency.
13. Emergency instructions.
14. Emergency procedures.
15. Type of Emergency: Where applicable for each type of emergency indicated below, include instructions and procedures for each system, subsystem, piece of equipment, and component:
16. Fire.
17. Flood.
18. Gas leak.
19. Water leak.
20. Power failure (Extreme heat/cold).
21. Water outage.
22. System, subsystem, or equipment failure.
23. Chemical release or spill.
24. Emergency Instructions: Describe and explain warnings, trouble indications, error messages, and similar codes and signals. Include responsibilities of LANL’s operating personnel for notification of installer, supplier, and manufacturer to maintain warranties.
25. Emergency Procedures: Include the following, as applicable:
26. Instructions on stopping.
27. Shutdown instructions for each type of emergency.
28. Operating instructions for conditions outside normal operating limits.
29. Required sequences for electric, electronic, pneumatic, and/or hydraulic systems or other systems where shut down and start.re-start sequence is important.
30. Special operating instructions and procedures.]
31. OPERATION MANUALS
32. Content: In addition to requirements in this Section, include operation data required in individual Specification Sections and the following information:
33. System, subsystem, and equipment descriptions. Use designations for systems and equipment indicated on Contract Documents.
34. Performance and design criteria if Construction Subcontractor has delegated design responsibility.
35. Operating standards.
36. Operating procedures.
37. Operating logs.
38. Wiring diagrams.
39. Control diagrams.
40. Piped system diagrams.
41. Precautions against improper use.
42. License requirements including inspection and renewal dates.
43. Descriptions: Include the following:
44. Product name and model number. Use designations for products indicated on Contract Documents.
45. Manufacturer's name.
46. Equipment identification with serial number of each component.
47. Equipment function.
48. Operating characteristics.
49. Limiting conditions.
50. Performance curves.
51. Engineering data and tests.
52. Complete nomenclature and number of replacement parts.
53. Operating Procedures: Include the following, as applicable:
54. Startup procedures.
55. Equipment or system break-in procedures.
56. Routine and normal operating instructions.
57. Regulation and control procedures.
58. Instructions on stopping.
59. Normal shutdown instructions.
60. Seasonal and weekend operating instructions.
61. Required sequences for electric, electronic, pneumatic and/or hydraulic systems or other systems where shut down and start/re-start sequence is important.
62. Special operating instructions and procedures.
63. Systems and Equipment Controls: Describe the sequence of operation, and diagram controls as installed.
64. Piped Systems: Diagram piping as installed, and identify color-coding where required for identification.
65. PRODUCT MAINTENANCE MANUALS
66. Content: Organize manual into a separate section for each product, material, and finish. Include source information, product information, maintenance procedures, repair materials and sources, and warranties and bonds, as described below.
67. Source Information: List each product included in manual, identified by product name and arranged to match manual's table of contents. For each product, list name, address, and telephone number of Installer or supplier and maintenance service agent, and cross-reference Specification Section number and title in Project Manual and drawing or schedule designation or identifier where applicable.
68. Product Information: Include the following, as applicable:
69. Product name and model number.
70. Manufacturer's name.
71. Color, pattern, and texture.
72. Material and chemical composition.
73. Reordering information for specially manufactured products.
74. Maintenance Procedures: Include manufacturer's written recommendations and the following:
75. Inspection and test procedures.
76. Types of cleaning agents to be used and methods of cleaning.
77. List of cleaning agents and methods of cleaning detrimental to product
78. Schedule for routine cleaning and maintenance.
79. Repair instructions.
80. Repair Materials and Sources: Include lists of materials and local sources of materials and related services.
81. Warranties and Bonds: Include copies of warranties and bonds and lists of circumstances and conditions that would affect validity of warranties or bonds.
82. Include procedures to follow and required notifications for warranty claims.
83. SYSTEMS AND EQUIPMENT MAINTENANCE MANUALS
84. Content: For each system, subsystem, and piece of equipment not part of a system, include source information, manufacturers' maintenance documentation, maintenance procedures, maintenance and service schedules, spare parts list and source information, maintenance service contracts, and warranty and bond information, as described below.
85. Source Information: List each system, subsystem, and piece of equipment included in manual identified by product name and arranged to match manual's table of contents. For each product, list name, address, and telephone number of Installer or supplier and maintenance service agent, and cross-reference Specification Section number and title in Project Manual and drawing or schedule designation or identifier where applicable.
86. Manufacturers' Maintenance Documentation: Manufacturers' maintenance documentation including the following information for each component part or piece of equipment:
87. Standard maintenance instructions and bulletins.
88. Drawings, diagrams, and instructions required for maintenance, including disassembly and component removal, replacement, and assembly.
89. Identification and nomenclature of parts and components.
90. List of items recommended or required to be stocked as spare parts.
91. Maintenance Procedures: Include the following information and items that detail essential maintenance procedures:
92. Test and inspection instructions.
93. Troubleshooting guide.
94. Precautions against improper maintenance.
95. Disassembly; component removal, repair, and replacement; and reassembly instructions.
96. Aligning, adjusting, and checking instructions.
97. Demonstration and training video recording, if available.
98. Maintenance and Service Schedules: Include service and lubrication requirements, list of required lubricants for equipment, and separate schedules for preventive and routine maintenance and service with standard time allotment.
99. Scheduled Maintenance and Service: Tabulate actions for daily, weekly, monthly, quarterly, semiannual, and annual frequencies.
100. Maintenance and Service Record: Include manufacturers' forms for recording maintenance.
101. Spare Parts List and Source Information: Include lists of replacement and repair parts, with parts identified and cross-referenced to manufacturers' maintenance documentation and local sources of maintenance materials and related services.
102. Maintenance Service Contracts: Include copies of maintenance agreements with name and telephone number of service agent.
103. Warranties and Bonds: Include copies of warranties and bonds and lists of circumstances and conditions that would affect validity of warranties or bonds.
104. Include procedures to follow and required notifications for warranty claims.

PART 3 EXECUTION

1. MANUAL PREPARATION
2. Operation and Maintenance Documentation Directory: Prepare a separate manual that provides an organized reference to emergency, operation, and maintenance manuals.
3. Emergency Manual: Assemble a complete set of emergency information indicating procedures for use by emergency personnel and by LANL’s operating personnel for types of emergencies indicated.
4. Product Maintenance Manual: Assemble a complete set of maintenance data indicating care and maintenance of each product, material, and finish incorporated into the Work.
5. Operation and Maintenance Manuals: Assemble a complete set of operation and maintenance data indicating operation and maintenance of each system, subsystem, and piece of equipment not part of a system.
6. Engage a factory-authorized service representative to assemble and prepare information for each system, subsystem, and piece of equipment not part of a system.
7. Prepare a separate manual for each system and subsystem, in the form of an instructional manual for use by LANL's operating personnel.
8. Manufacturers' Data: Where manuals contain manufacturers' standard printed data, include only sheets pertinent to product or component installed. Mark each sheet to identify each product or component incorporated into the Work. If data include more than one item in a tabular format, identify each item using appropriate references from the Contract Documents. Identify data applicable to the Work and delete references to information not applicable.
9. Prepare supplementary text if manufacturers' standard printed data are not available and where the information is necessary for proper operation and maintenance of equipment or systems.
10. Drawings: Prepare drawings supplementing manufacturers' printed data to illustrate the relationship of component parts of equipment and systems and to illustrate control sequence and flow diagrams. Coordinate these drawings with information contained in record Drawings to ensure correct illustration of completed installation.
11. Do not use original project record documents as part of operation and maintenance manuals.
12. Comply with requirements of newly prepared record Drawings in Section 01 7839 *Project Record Documents*.
13. Comply with Section 01 7700 *Closeout Procedures* for schedule for submitting operation and maintenance documentation.

END OF SECTION

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Do not delete the following reference information:

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THE FOLLOWING REFERENCE IS FOR LANL USE ONLY

This project specification is based on LANL Master Specification 01 7823 R0, dated March 23, 2015.