EFFECTIVE DATE
 01 June 2020

Project Name, Project Location 017823 - 1
Design Professional Name, Project No. OPERATION AND MAINTENANCE DATA
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1.1 RELATED DOCUMENTS
A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and
other Division 01 Specification Sections, apply to this Section.
1.2 SUMMARY
A. Section includes administrative and procedural requirements for preparing operation and maintenance
manuals, including the following:
1. Operation and maintenance documentation directory
2. Emergency manuals
3. Operation manuals for systems, subsystems, and equipment
4. Product maintenance manuals
5. Systems and equipment maintenance manuals
1.3 DEFINITIONS
A.

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E. 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. If no
designation exists, assign a designation according to ASHRAE Guideline 4-2008, "Preparation of Operating
and Maintenance Documentation for Building Systems".
2.2 REQUIREMENTS FOR EMERGENCY, OPERATION, AND MAINTENANCE MANUALS
A.

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b. 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.
2.3 EMERGENCY MANUALS
A. Content: Organize manual into a separate section for each of the following:
1. Type of emergency
2. Emergency instructions
3. Emergency procedures
B. 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:
1. Fire
2. Flood
3. Gas leak
4. Water leak
5. Power failure
6. Water outage
7. System, subsystem, or equipment failure
8. Chemical release or spill
C. Emergency Instructions: Describe and explain warnings, trouble indications, error messages, and similar
codes and signals. Include responsibilities of Owner's operating personnel for notification of Installer,
supplier, and manufacturer to maintain warranties.
D. Emergency Procedures: Include the following, as applicable:

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Proje c t N am e , Project Location 017823 - 5

D esign Pro fessio na l Na m e , Project No. OPERATION AND MAINTENANCE DATA

G. Maintenance Service Contracts: Include copies of maintenance agreements with name and telephone number of service agent.
H. Warranties and Bonds: Include copies of warranties and bonds and lists of circumstances and conditions that would affect validity of warranties or bonds.
1. Include procedures to follow and required notifications for warranty claims.

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3.1 MANUAL PREPARATION AND DELIVERY A. Operation and Maintenance Documentation Directory: Prepare a separate manual that provides an organized reference to emergency, operation, and maintenance manuals. B. Emergency Manual: Assemble a complete set of emergency information indicating procedures for use by emergency personnel and by Owner's operating personnel for types of emergencies indicated. C. Product Maintenance Manual: Assemble a complete set of maintenance data indicating care and maintenance of each product, material, and finish incorporated into the Work. D. 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.
1. Engage a factory-authorized service representative to assemble and prepare information for each system, subsystem, and piece of equipment not part of a system.
2. Prepare a separate manual for each system and subsystem, in the form of an instructional manual for use by Owner's operating personnel. E. 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.
1. 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. F. Drawings: Prepare drawings supplemen