



Circular Letter No.: 2023.185

Issue Date: 28 April 2023

Application: BEAM Plus NB Version 2.0

Effective Date: 28 April 2023

IDCM 15 Document Management System

1. The Technical Circular Letter hereby announces an update to the credit content for **IDCM 15 Document Management System** under BEAM Plus NB v2.0.
2. The aim of the update is to provide clarification on the submittal requirement under IDCM 15a on design and construction teams document management system and IDCM 15b on facility management team document management platform.
3. The requirements given in Section 2.3 of the BEAM Plus NB v2.0 Manual (2021 Edition) are hereby updated with the enclosures in Annex A of this Technical Circular Letter.
 - Pages Annex A-1 to A-4 shall replace all contents in Section 2.3 on IDCM 15 specified in Pages 104 to 106 of the Manual.
4. Approved PA projects: For projects that have already completed PA and have certain assessment approach approved, the Applicant may opt to adopt the same assessment criteria for FA or voluntarily comply with this Technical Circular Letter. For the avoidance of doubt, the Applicant shall provide PA evidence (e.g., extract of the PA report, documents submitted for assessment in PA, etc.) in subsequent assessments to support the intention of using the same assessment methodology as in PA.

A handwritten signature in black ink, appearing to read "Ir Colin Chung", is written over a horizontal line.

Ir Colin Chung
Chairperson of Standards Sub-committee

Annex A:
Updated Credit Content for Section 2.3 under BEAM Plus NB v2.0

2 Integrated Design and Construction Management	2.3 Smart Design and Technologies
	IDCM 15 Document Management System
Extent of Application	All buildings
Objective	Encourage tidy and digital documentation throughout the design and construction process for the ease of handing over to facility management teams.
Credits Attainable	2
Credit Requirement	<p>(a) Project Team Document Management</p> <p>1 credit for demonstrating the use of document management systems within the design and construction teams.</p> <p>(b) Facility Management Team Document Management</p> <p>1 credit for demonstrating the use of document management platform by the building owner or building management company.</p>
Assessment	<p>(a) Project Team Document Management</p> <ol style="list-style-type: none"> 1. Demonstrate coordinated use of document management system among design and construction teams which shall include the following members: <ol style="list-style-type: none"> 1.1. Project owner; 1.2. Architects/ project designers; 1.3. MEP engineers; 1.4. Structural engineers; 1.5. Quantity surveyors; and 1.6. Contractors. 2. Provide technical information of the document management system including: <ol style="list-style-type: none"> 2.1. Naming rules for the digital documents to follow; 2.2. Filing rules, in the form of hierarchy, for the digital documents to follow; and 2.3. File format of digital documents. 3. The document management system should perform the following functions: <ol style="list-style-type: none"> 3.1. Storage of documents; 3.2. Spare storage for future documents; 3.3. Allow update of existing documents; 3.4. Accessible online;

- 3.5. Support multiple users access and different level of access rights;
 - 3.6. Alarms and notifications; and
 - 3.7. Security protection by passwords.
- 4. Provide evidence (e.g. screenshots) to demonstrate the document management system should at minimum store the following documents:
 - 4.1. Project timeline/ programme;
 - 4.2. Meeting minutes;
 - 4.3. All documents submitted to government bodies; and
 - 4.4. Material submissions from contractors.

(b) Facility Management Team Document Management

- 1. Provide technical information of the document management platform by the building owner/ building management company including:
 - 1.1. Naming rules for the digital documents to follow;
 - 1.2. Filing rules, in the form of hierarchy, for the digital documents to follow; and
 - 1.3. File format of digital documents.
- 2. The document management platform should perform the following functions:
 - 2.1. Storage of documents;
 - 2.2. Spare storage for future documents;
 - 2.3. Allow update of existing documents;
 - 2.4. Accessible online;
 - 2.5. Support multiple users access and different level of access rights;
 - 2.6. Alarms and notifications; and
 - 2.7. Security protection by passwords.
- 3. Provide evidence (e.g. screenshots or declaration letter by the project owner/ developer or building management company) to demonstrate the use of document management platform for future facility management team.

The document management platform should store the documents required for facility management, which at minimum should include items 3.1 to 3.4. The below list is not exhaustive and the Applicant should store the documents as required to suit their own operational needs.

- 3.1. All documents specified in IDCM 11 to IDCM 14 (if credit(s) is/ are targeted);
- 3.2. Approved drawings by all government departments;
- 3.3. All documents submitted to government bodies;
- 3.4. As-built drawings;

- 3.5. Waste management manual;
- 3.6. Water management manual;
- 3.7. Tenant fitting out guide;
- 3.8. Tenancy green guide; and
- 3.9. Tenant feedback procedures notes and records.

Submittals**(a) Project Team Document Management**

Supporting Documents <i>Please provide softcopies with filename prefix as indicated on the leftmost column below.</i>		PA	FA
IDCM_15a_00	BEAM Plus NB submission template for IDCM 15a	✓	✓
IDCM_15a_01	Technical specification or other form of supporting (e.g. product catalogue, supplier's information, etc.) showing that the system is capable of performing the functions as prescribed in the assessment requirements items (2) and (3)	✓	✓
IDCM_15a_02	Evidence (e.g. screenshots) to demonstrate the use of document management system within design and construction teams	-	✓

(b) Facility Management Team Document Management

Supporting Documents <i>Please provide softcopies with filename prefix as indicated on the leftmost column below.</i>		PA	FA
IDCM_15b_00	BEAM Plus NB submission template for IDCM 15b	✓	✓
IDCM_15b_01	Extract of tender documents, contract conditions and/or specifications requiring the document management platform for future facility management team	✓	-
IDCM_15b_02	Evidence (e.g. approved contractor's submission with technical information) showing that the platform is capable of performing the functions as prescribed in the assessment requirements items (1) and (2)	-	✓

IDCM_15b_03	<p>Declaration letter by the project owner/ developer/ building management company confirming that the document management platform will be used by the building owner/ building management company</p> <p>[or]</p> <p>Evidence (e.g. screenshots) to demonstrate the use of document management platform by the building owner/ building management company</p>	-	✓
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Remarks**(a) Additional Information**

Hong Kong Green Building Council – Hong Kong Green Office Guide. [ONLINE]. Available at: <https://www.hkgbc.org.hk/eng/engagement/guidebooks/green-office-guide/index.jsp>. [Accessed April 2021].

Hong Kong Green Building Council – Hong Kong Green School Guide. [ONLINE]. Available at: <https://www.hkgbc.org.hk/eng/engagement/guidebooks/green-school-guide/index.jsp>. [Accessed April 2021].

Hong Kong Green Building Council – Hong Kong Green Shop Guide. [ONLINE]. Available at: <https://www.hkgbc.org.hk/eng/engagement/guidebooks/green-shop-guide/index.jsp>. [Accessed April 2021].

Hong Kong Green Building Council – Green Tenancy Driver For Office Buildings. [ONLINE]. Available at: <https://www.hkgbc.org.hk/eng/engagement/guidebooks/green-tenancy-driver/index.jsp>. [Accessed April 2021].

The Hong Kong Institute of Surveyors - Green Property Management Practices. [ONLINE]. Available at: <https://www.hkis.org.hk/ufiles/gpmp2015.pdf>. [Accessed April 2021].

(b) Related Credits

In conjunction with IDCM 3c Design Consideration for Operation and Maintenance, it is recommended to consult the facility management team while specifying the document management system.