Publish Date

ESTABLISH PROJECT’S COMMON DATA ENVIRONMENT (CDE)

Company Name

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| Project Information | |
| Lead Appointed Party Name | Lead Appointed Party Name |
| Company Name | Company Name |
| Company Address | Company Address |
| Originator Code | ORG |
| Client Name | Client Name |

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| --- | --- |
| Project Details | |
| Project Name | Project Name |
| Project Address | Project Address |
| Project Number | Project Number |
| Project Value | Project Value |
| Document Reference | 8068-ORG-XX-XX-SP-X-5170 |

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| --- | --- |
| Document Status | |
| Status | Status |
| Suitability | Suitability |
| Publish Date | Publish Date |

Document Issue

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| Revision | Date | Author | Checked | Approved | Revision Comments |
| *01* | *12/05/2024* | *J. Smith* | *M. Brown* | *T. Johnson* | *Initial draft completed.* |
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# Introduction

## Purpose

This document outlines the process for establishing a Common Data Environment (CDE) for Project Name. The CDE will be used to manage project information efficiently and securely, ensuring all stakeholders have access to accurate and up-to-date information.

## Scope

The scope of this document covers the selection, configuration, and management of the CDE, it shall be adjusted to be specific to the CDE of your choice.

## Objectives

* To establish a centralized platform for managing project data.
* To ensure consistent and secure information sharing among project stakeholders.
* To improve collaboration and reduce errors through streamlined data management.

# Common Data Environment Overview

## Definition

A Common Data Environment (CDE) is a shared repository where project information is stored, managed, and accessed. It facilitates collaboration by providing a single source of truth for all project data.

## Benefits

* Enhanced collaboration among stakeholders.
* Improved data accuracy and consistency.
* Streamlined project workflows.
* Secure data management and access control.

## Selection of CDE Platforms

### CDE Functinality

CDE is a cloud-based project management collaboration tool designed to streamline construction project workflows, that supports complex construction and engineering projects by providing tools for managing information, processes, and teams while providing a comprehensive platform for data collection, tracking, and analysis.

#### Key Features

* Real-time data collection and reporting.
* Mobile access for on-site data entry.
* Customizable dashboards and reports.
* Integration with other Trimble solutions.
* Document control and management.
* Workflow automation.
* Project communication and collaboration.
* Secure data storage and access.

# Establishing the CDE

## Configuration of CDE

### Setup and User Management

* Create a project within the CDE of your choice
* Define user roles and permissions.
* Invite project stakeholders to join the platform.

### Data Structure

* Set up project phases and milestones.
* Organize data into relevant categories (e.g., drawings, reports, inspections).
* Establish CDE structure for document storage.

Define document types and metadata requirements.

### Customization

* Configure dashboards to display key project metrics.
* Create custom forms and templates for data entry.
* Configure workflows for document approvals and reviews.
* Set up project-specific templates and forms.

# Data Management Processes

## Data Input and Validation

* Ensure all data entered into the CDE is accurate and validated.
* Use standardized templates and forms for data entry.

## Data Security and Access Control

* Implement access controls based on user roles.
* Regularly review and update permissions to ensure data security.

## Data Backup and Recovery

* Schedule regular data backups to prevent data loss.
* Establish a data recovery plan in case of system failure.

# Training and Support

## User Training

* Provide training sessions for all users on how to use CDE.
* Develop user manuals and training materials.

## Technical Support

* Establish a support team to assist users with technical issues.
* Provide contact information for accessing technical support.

# Monitoring and Continuous Improvement

## Performance Monitoring

* Regularly review CDE performance and user feedback.
* Monitor key metrics such as data accuracy, collaboration efficiency, and system uptime.

## Continuous Improvement

* Update the CDE configuration based on project needs and user feedback.
* Implement new features and improvements as they become available.

# Appendices

* **Appendix A: Glossary:** Definitions of terms used in this document.
* **Appendix B: Reference Documents:** List of documents referenced in the CDE establishment process.
* **Appendix C: Online Reference:** Links toTypical CDE platforms setup guide.

## Appendix A: Glossary

* **Common Data Environment (CDE):** A shared digital repository for managing project information.

## Appendix B: Reference Documents

* ISO 19650-1: Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 1: Concepts and principles.
* ISO 19650-2: Organization and digitization of information about buildings and civil engineering works, including building information modelling (BIM) – Information management using building information modelling – Part 2: Delivery phase of the assets.
* 8068-PDI-XX-XX-SP-X-5410 BIM Execution Plan (BEP)
* Company Name Project Management Guidelines

## Appendix C: Online Reference

### Autodesk

<https://knowledge.autodesk.com/support/bim-360/learn-explore/caas/sfdcarticles/sfdcarticles/BIM-360-Design-Getting-Started.html>

### Aconex

<https://help.aconex.com/aconex/our-main-application/aconex-admin-kit>

### Viewpoint

<https://help.viewpoint.com/en/viewpoint-for-projects/viewpoint-for-projects/users-guide/users-guide>