

Defining Classifications for Assessment Items

Classifications are categories of building elements and systems (such as Mechanical, Concrete, Electrical) that you can use to manage your assessment items.

If you classify your assessment items according to these categories, you can use these categories to organize your assessment data. For example, when examining assessment items, you can choose to have the view display only those assessment items whose Classification is "Electrical", further classified to "Sound and Video."

You can have multiple levels of classifications. For example, you might have a Utility Services classification, which has sub-classifications of Water, Sewer, Natural Gas, and Electric. These, in turn, can have their own sub-classifications. You can choose as deep a hierarchy as you require, with some levels having more sub-levels than others. By establishing classifications in this manner, you can roll up your assessment data to multiple levels.

The CSI Standard Classifications

Although you can develop any type of classification category, you may wish to start with classifications of building elements that were developed by the Construction Specifications Institute (CSI). These standard classifications provide a common system of organizing and presenting facilities, infrastructure, and construction data for the construction and building design industries.

There are two types of CSI classifications:

- **Uniformat** -- Useful for facility management tasks. These are the values used in the sample HQ project and are available to be imported into new projects, as described below. The CSI Uniformat code is designated for assessing building systems. The commissioning project template sample data is based on DGS systems - breakdown building systems as being audited.
- **CI Master Format** -- Classifies building elements from an architectural or new construction perspective. ARCHIBUS ships with CI Master Format as sample-data (CSI table.)
- You can enter these values into the Classifications table if you wish.

By using the classifications that adhere to accepted industry standards, you can attain standard replacement, maintenance, and repair costs. For example, other industry sources (such as the RS Means Costs estimating guides) use these same CSI classifications. If your rooms and equipment are assigned these categories, you can consult these guides to estimate the costs of addressing deficiencies with these items. For information, see www.csinet.org.

Entering the CSI Classifications in a New Project

When you start a new project, the Classifications table will be empty.

- **Uniformat:** If you want to use the CSI Uniformat classifications in your project, run the Data Transfer command to import the `ca_Classifications_CSI_UniFormat.csv` file from the \PDA folder. (This folder should be copied from the Web Central DVD to a location of your choice.) You can then add to these classifications if necessary.
- **Master Format:** ARCHIBUS does not ship CSI Master Format values. Therefore, you can enter the Master Format values in the Classifications table of your new project.

Creating New Classifications

To add new classifications:

1. From the Process Navigator, choose Business Process Owner/Define Classifications.
2. The system displays two panes: the left pane for drilling down through the classification tree, and the right pane for entering classification data. The left pane display "0 - Top Level" when your first run this task. Click on this entry to display the top level of the tree.
3. Drill down through the tree in the left pane to find the classification under which you want to create a new classification. For example, if you want to create a Level 3 classification, beneath the Concrete/Concrete Forms classification, do the following
 - Click on the expand button for "0 - Top Level" to get started.
 - Click the expand button for 03000 -- Concrete (Level 1).
 - Click the expand button for 03100 -- Concrete and Forms (Level 2).
 - Note the numbers that are already in use for Level 3, such as 03150.
 - Click Add New.
 - In the right pane, enter a value for the Classification Code that corresponds with your current position in the hierarchy and which is not already in use. In this example, you might enter a value of 03250. You can also enter a description of this classification. See the below table for more information on these fields.
 - Choose Save.
 - The system saves the classification and generates its hierarchical ID, which it displays in the form.

- Return to the left pane and choose the Refresh button. Drill down through the tree and the system displays the new classification.

Click here to get started with the tree.

Drill down through the Concrete classifications to reach Concrete Accessories. Click on it, and the system displays it in the right pane for editing.

Define Classifications

Classifications

0 Top Level

02000 SITE CONSTRUCTION

03000 CONCRETE

03100 CONCRETE FORMS AND ACCESSORIES

03150 Concrete Accessories

03200 CONCRETE REINFORCEMENT

03300 CAST-IN-PLACE CONCRETE

03400 PRECAST CONCRETE

03500 CEMENTITIOUS DECKS AND UNDERLAYMENT

03600 GROUTS

03900 CONCRETE RESTORATION AND CLEANING

04000 MASONRY

05000 METALS

06000 WOOD AND PLASTICS

07000 THERMAL & MOISTURE PROTECTION

Add New

Refresh

Classification

Classification Code: 03150

Hierarchy Trace: 0|03000|03100|03150|

Classification Description: Concrete Accessories

Save

Delete

Cancel

The system displays the item's current position in the hierarchy here. Note that the Concrete Accessories classification is at the third level of the hierarchy.

To add a new classification, drill down through the tree to the level to which you want to add a classification, and choose Add New.

Note that some classifications have a deeper hierarchy than do others. For example, the Grouts classification is at Level 2 and does not have further classifications, whereas Concrete Accessories is a Level 3 classification.

Editing Classifications

To edit a classification code or description, you follow the same procedure as above to drill down through the tree.

To select the classification to edit, click on it and the system displays its current values in the right pane. From here, you can edit the Classification Code or Classification Description values.

Choose Save when through.

Fields of the Classifications Table

Field	Purpose
Classification Code	The unique name for this classification element. This is typically a numeric value that reflects the classification's position in the hierarchy. For examples of how the numeric values can reflect the hierarchy position, see the sample HQ database which ships with the CSI Unifomat classifications.
Classification Description	Enter your own value, or click the ellipses button and choose a value from the list.
Hierarchy Trace	Shows the classification's level in the hierarchy. This field is not editable. The value is generated by the system based on this record's level in the hierarchy. You set the hierarchy by drilling down through the hierarchical tree, as described above.

Viewing Classifications

If you are working from the Asset Management or Enterprise Asset Management applications, you can review all the classifications used at your site by selecting the Business Process Owner - Asset Management / View Classifications task.

- Use the Smart Search Filter to limit the view to specific classifications that you want to review.
- Export the data to a DOCX file using the Paginated Report button, or to a spreadsheet using the XLS button.

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