ARUP ASSOCIATES

PRODUCT DATA TEMPLATES

A SIMPLE HOW-TO

IDENTIFY NEED

New TYPE of equipment, not new product of existing type.
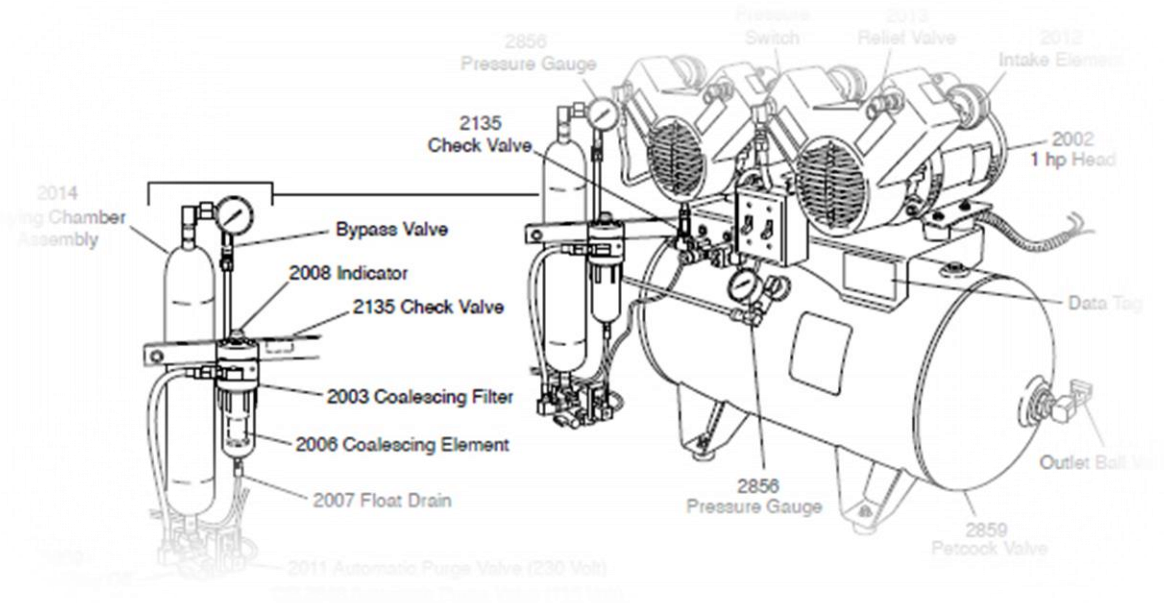
IDENTIFY NEED
Is there one of these on the Master List of PDTs?

Template	Owner	Author	Progress	Author Company	Author Name	Author Email
Actuator	CIBSE		None			
Air Curtain	CIBSE	RIM	None	SPC	Richard Meskimmon	Richard.Meskimmon@spcoils.co.uk
Air Diffuser	CIBSE	CC	Technical Approval	Arup	Carl Collins	carl.collins@arup.com
Air Handler	CIBSE	RV	Technical Approval	Hoare Lea	Richard Vincent	richardvincent@hoarelea.com
Air Heater	CIBSE	TK	None	ICOM	Tahsina Khan	tahsina.khan@icom.org.uk
Air Louvre	CIBSE	CC	Technical Approval	Arup	Carl Collins	carl.collins@arup.com
Attenuator	CIBSE	CC	Technical Approval	Arup	Carl Collins	carl.collins@arup.com
Battery	CIBSE	CC	Technical Approval	Arup	Carl Collins	carl.collins@arup.com
Beacon	CIBSE		None			
Bell Sounder	CIBSE		None			
Boiler	CIBSE	TK	None	ICOM	Tahsina Khan	tahsina.khan@icom.org.uk
Break Glass	CIBSE	CC	Technical Approval	Arup	Carl Collins	carl.collins@arup.com
Buffer Vessel	CIBSE	NT	Technical Approval	Balfour Beatty	Neil Thompson	Neil.Thompson@balfourbeatty.com
Burners	CIBSE	TK	None	ICOM	Tahsina Khan	tahsina.khan@icom.org.uk
Calorifier	CIBSE		None			
CAV Box	CIBSE	IG	None	Trox	Iskender Gencer	Igencer@troxuk.co.uk
CHP	CIBSE	TK	None	ICOM	Tahsina Khan	tahsina.khan@icom.org.uk
Chilled Beam	CIBSE	IG	None	Trox	Iskender Gencer	Igencer@troxuk.co.uk
Chiller	CIBSE	AS	None			
Circuit Breaker	CIBSE		None			
Cistern	CIBSE		None			
Condenser	CIBSE		None			
Contactor	CIBSE		None			
Cooling Coil	CIBSE	RIM	Technical Approval	SPC	Richard Meskimmon	Richard.Meskimmon@spcoils.co.uk
Cooling tower	CIBSE		None			
Damper (fire, smoke, VCD)	CIBSE	DF	Technical Approval	Ruskin Air	David Fitzpatrick	dfitzpatrick@ruskinuk.co.uk
Dehumidifier	CIBSE		None			
Detector	CIBSE		None			
Door Contact	CIBSE		None			
Drain	CIBSE		None			
DX Indoor Unit	CIBSE	WC	None	Hitachi	Warren Clark	Warren.clark@hitachi-eu.com
DX Outdoor Unit	CIBSE	WC	None	Hitachi	Warren Clark	Warren.clark@hitachi-eu.com
Earthing Pit	CIBSE	MB	None	Atkins	Mathew Beard	Mathew.beard@atkinsglobal.com
Emergency Stop	CIBSE		None			
Evaporator	CIBSE		None			
Expansion Tank	CIBSE		None			
Fan Box	CIBSE	CC	Technical Approval	Arup	Carl Collins	carl.collins@arup.com
Fan Coil Unit	CIBSE	MP	Technical Approval	Trox	Michelle Perry	MPerry@troxuk.co.uk
Fan Convector	CIBSE	RIM	None	SPC	Richard Meskimmon	Richard.Meskimmon@spcoils.co.uk
Filter	CIBSE		None			
Finned Tube	CIBSE		None			
Fire Alarm Panel	CIBSE		None			
Floodlight	CIBSE		None			
Floor Box	CIBSE		None			
Gas Booster	CIBSE	TK	None	ICOM	Tahsina Khan	tahsina.khan@icom.org.uk
Generator	CIBSE		None			

IDENTIFY DATA FIELDS
Is there one of these, or something similar in SPie
(Specifier's Products Information Exchange)

IDENTIFY DATA FIELDS
Is there anything similar already covered?
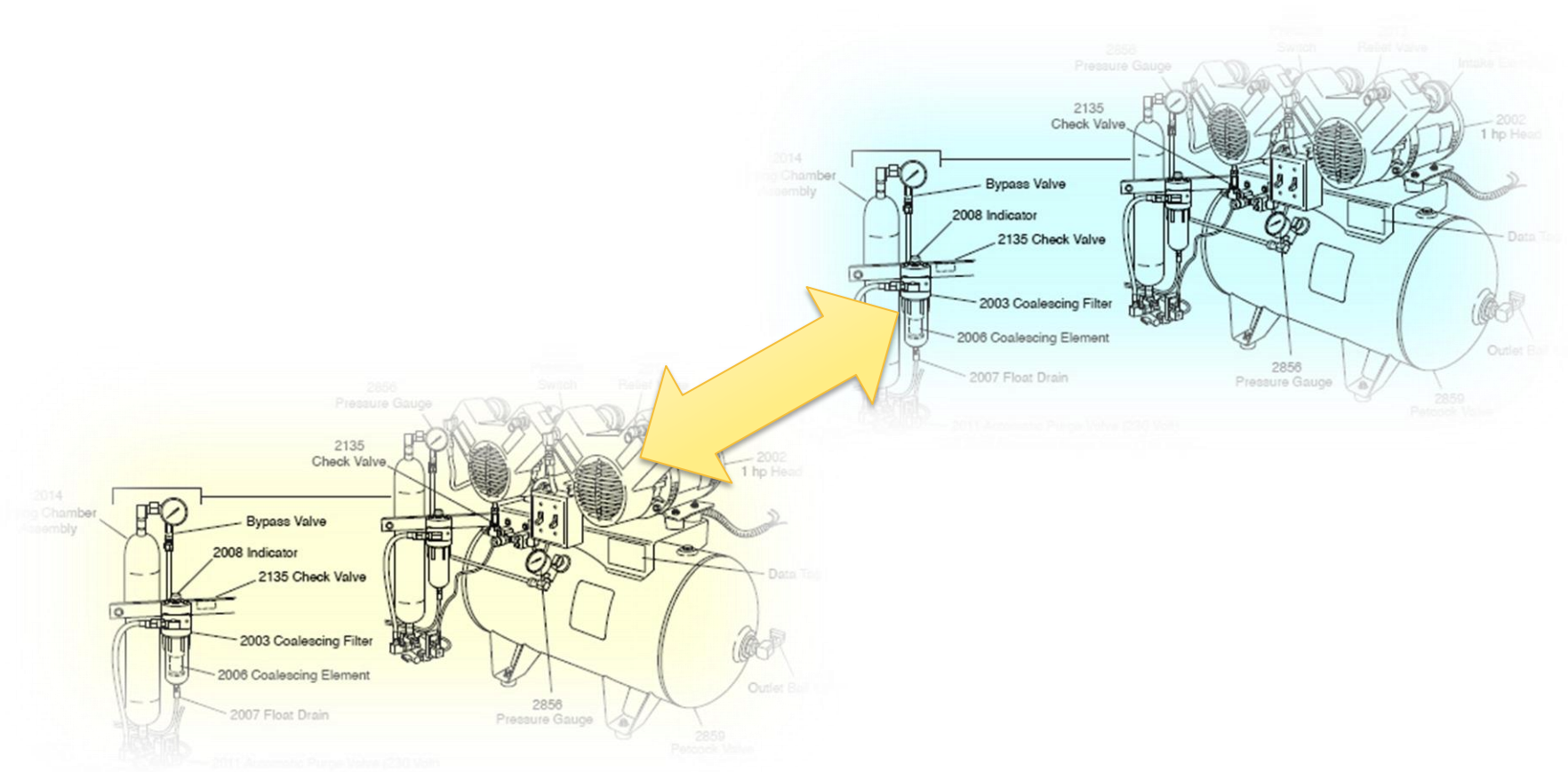
PDT Template

Gives a good start and some guidance

Template Category	Category				
Template Version	v.				
Category Description	Description				
Classification System					
Classification	Value				
Information Category	Parameter Name	Value	Units	Notes	
Manufacturer Data					
Specifications	Manufacturer		Text		
Specifications	Manufacturer Website		URL		
Specifications	Product Range		Text		
Specifications	Product Model Number (Code)		Text		
Specifications	CE Approval No.		Text		
Specifications	Product Literature Webpage		URL		
Construction Data					
Specifications	Type		Text	This is a COBie field, other fields will be required in final PDTs.	
Specifications	Shape		Text	This is a COBie field, other fields will be required in final PDTs.	
Specifications	Material		Text	This is a COBie field, other fields will be required in final PDTs.	
Dimensional Data					
Specifications	Overall Length		mm		
Specifications	Overall Width		mm		
Specifications	Overall Height		mm		
Specifications	Gross Weight		kg	Equates to Operating Weight	
Specifications	Shipping Weight		kg		
Specifications	Access Clearance Top		mm		
Specifications	Access Clearance Bottom		mm		
Specifications	Access Clearance Left		mm		
Specifications	Access Clearance Right		mm		
Specifications	Access Clearance Front		mm		
Specifications	Access Clearance Rear		mm		
Performance Data					
Specifications	ReferenceStandard		Text		
Electrical Data (if required)					
Specifications	Incoming Supply Electrical Voltage		Volts		
Specifications	Incoming Supply Phase		Number	1,3	
Specifications	Incoming Supply Electrical Frequency		Hertz	50,60	
Specifications	Motor Enclosure Rating		Text	IP numbers	
Specifications	Motor Type		Text		
Specifications	Number of Poles		Number	1,3	
Specifications	Motor Efficiency Class (CEMEP)		Text		
Specifications	Starting Method		Text	DoL,StarDelta, Soft	
Controls					
Specifications	BMS Links		Y/N		
Sustainability					
Sustainable Material	Embodied Carbon		kgCO2		
Sustainable Material	Life Cycle Analysis		Number	BREEAM	
Sustainable Material	Location of Manufacturer		GridRef	Northing,Easting	
Sustainable Material	Green Guide for Specification		Text	A - E	
Sustainable Material	Environmental Product Declaration		Text	3rd Party Verification	
Sustainable Material	Responsible Sourcing of Materials		Text	Endorsing body	
Sustainable Material ETL	URL to Energy Technology List		URL	Hyperlink to ETL webpage for product	
Sustainable Material LEED	Responsible Extraction of Materials		Text	TBA	
Sustainable Material LEED	Material Ingredient Reporting		Text	TBA	
Operations & Maintenance					
Facilities/Asset Management	URL to O&M Manual		Text	Hyperlink to Manufacturer O&M Data	
Facilities/Asset Management	Daily		Text	Maintenance tasks or SFG2012 codes.	
Facilities/Asset Management	Weekly		Text	Maintenance tasks or SFG2012 codes.	
Facilities/Asset Management	Monthly		Text	Maintenance tasks or SFG2012 codes.	
Facilities/Asset Management	Quarterly		Text	Maintenance tasks or SFG2012 codes.	
Facilities/Asset Management	6 Monthly		Text	Maintenance tasks or SFG2012 codes.	
Facilities/Asset Management	Annually		Text	Maintenance tasks or SFG2012 codes.	
Facilities/Asset Management	Bespoke Timeframe		Text	Maintenance tasks or SFG2012 codes.	
Facilities/Asset Management	Maintenance Required: 0-300hrs		Text	Maintenance tasks required during this time frame.	
Facilities/Asset Management	Maintenance Required: 301-600hrs		Text	Maintenance tasks required during this time frame.	
Facilities/Asset Management	Maintenance Required: 601-1000hrs		Text	Maintenance tasks required during this time frame.	

PDT Titles

Add the Category Name and Description (just a single sentence).

	Template Category	Category			
1					
2	Template Version	v.			
3	Category Description	Description			
4	Classification System				
5	Classification	Value			
6	Information Category	Parameter Name	Value	Units	Notes
7	**Manufacturer Data**				
8	Specifications	Manufacturer		Text	
9	Specifications	Manufacturer Website		URL	
10	Specifications	Product Range		Text	
11	Specifications	Product Model Number (Code)		Text	
12	Specifications	CE Approval No.		Text	
13	Specifications	Product Literature Webpage		URL	
14	**Construction Data**				
15	Specifications	Type		Text	This is a COBie field, other fields will be required in final PDTs.
16	Specifications	Shape		Text	This is a COBie field, other fields will be required in final PDTs.
17	Specifications	Material		Text	This is a COBie field, other fields will be required in final PDTs.
18	**Dimensional Data**				
19	Specifications	Overall Length		mm	
20	Specifications	Overall Width		mm	
21	Specifications	Overall Height		mm	
22	Specifications	Gross Weight		kg	Equates to Operating Weight
23	Specifications	Shipping Weight		kg	
24	Specifications	Access Clearance Top		mm	
25	Specifications	Access Clearance Bottom		mm	
26	Specifications	Access Clearance Left		mm	
27	Specifications	Access Clearance Right		mm	
28	Specifications	Access Clearance Front		mm	
29	Specifications	Access Clearance Rear		mm	
30	**Performance Data**				
31	Specifications	Reference Standard		Text	
32	**Electrical Data (if required)**				
33	Specifications	Incoming Supply Electrical Voltage		Volts	
34	Specifications	Incoming Supply Phase		Number	1,3
35	Specifications	Incoming Supply Electrical Frequency		Hertz	50,60
36	Specifications	Motor Enclosure Rating		Text	IP numbers
37	Specifications	Motor Type		Text	
38	Specifications	Number of Poles		Number	1,3
39	Specifications	Motor Efficiency Class (CEMEP)		Text	
40	Specifications	Starting Method		Text	DoL,StarDelta, Soft
41	**Controls**				
42	Specifications	BMS Links		Y/N	
43	**Sustainability**				
44	Sustainable Material	Embodied Carbon		kgCO2	
45	Sustainable Material	Life Cycle Analysis		Number	BREEAM
46	Sustainable Material	Location of Manufacturer		GridRef	Northing,Easting
47	Sustainable Material	Green Guide for Specification		Text	A - E
48	Sustainable Material	Environmental Product Declaration		Text	3rd Party Verification
49	Sustainable Material	Responsible Sourcing of Materials		Text	Endorsing body
50	Sustainable Material ETL	URL to Energy Technology List		URL	Hyperlink to ETL webpage for product
51	Sustainable Material LEED	Responsible Extraction of Materials		Text	TBA
52	Sustainable Material LEED	Material Ingredient Reporting		Text	TBA
53	**Operations & Maintenance**				
54	Facilities/Asset Management	URL to O&M Manual		Text	Hyperlink to Manufacturer O&M Data
55	Facilities/Asset Management	Daily		Text	Maintenance tasks or SFG2012 codes.
56	Facilities/Asset Management	Weekly		Text	Maintenance tasks or SFG2012 codes.
57	Facilities/Asset Management	Monthly		Text	Maintenance tasks or SFG2012 codes.
58	Facilities/Asset Management	Quarterly		Text	Maintenance tasks or SFG2012 codes.
59	Facilities/Asset Management	6 Monthly		Text	Maintenance tasks or SFG2012 codes.
60	Facilities/Asset Management	Annually		Text	Maintenance tasks or SFG2012 codes.
61	Facilities/Asset Management	Bespoke Timeframe		Text	Maintenance tasks or SFG2012 codes.
62	Facilities/Asset Management	Maintenance Required: 0-300hrs		Text	Maintenance tasks required during this time frame.
63	Facilities/Asset Management	Maintenance Required: 301-600hrs		Text	Maintenance tasks required during this time frame.
64	Facilities/Asset Management	Maintenance Required: 601-1000hrs		Text	Maintenance tasks required during this time frame.

PDT Classification

Choose a Classification System from the list and apply a Value (optional)

PDT Headers
Identify any additional Headers required

Information Category	Parameter Name	Value	Units	Notes
Template Category	Category			
Template Version	v.			
Category Description	Description			
Classification System				
Classification	Value			
Information Category	**Parameter Name**	...ue	**Units**	**Notes**
Manufacturer Data				
Specifications	Manufacturer		Text	
Specifications	Manufacturer Website		URL	
Specifications	Product Range		Text	
Specifications	Product Model Number (Code)		Text	
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Specifications	Access Clearance Left		mm	
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Specifications	Access Clearance Rear		mm	
Performance Data				
Specifications	ReferenceStandard		Text	
Electrical Data (if required)				
Specifications	Incoming Supply Electrical Voltage		Volts	
Specifications	Incoming Supply Phase		Number	1,3
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Specifications	Motor Enclosure Rating		Text	IP numbers
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Specifications	Number of Poles		Number	1,3
Specifications	Motor Efficiency Class (CEMEP)		Text	
Specifications	Starting Method		Text	DoL,StarDelta, Soft
Controls				
Specifications	BMS Links		Y/N	
Sustainability				
Sustainable Material	Embodied Carbon		kgCO2	
Sustainable Material	Life Cycle Analysis		Number	BREEAM
Sustainable Material	Location of Manufacturer		GridRef	Northing,Easting
Sustainable Material	Green Guide for Specification		Text	A - E
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Facilities/Asset Management	Maintenance Required: 0-300hrs		Text	Maintenance tasks required during this time frame.
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Facilities/Asset Management	Maintenance Required: 601-1000hrs		Text	Maintenance tasks required during this time frame.

PDT Fields

List out the Fields that are required to describe the product as a catalogue would.

	A	B	C	D	E	F
1	Template Category	**Category**				
2	Template Version	v.				
3	Category Description	Description				
4	Classification System					
5	Classification	Value				
6	Information Category	Parameter Name	Value	Units	Notes	
7		**Manufacturer Data**				
8	Specifications	Manufacturer		Text		
9	Specifications	Manufacturer Website		URL		
10	Specifications	Product Range		Text		
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24	Specifications	Access Clearance Top		mm		
25	Specifications	Access Clearance Bottom		mm		
26	Specifications	Access Clearance Left		mm		
27	Specifications	Access Clearance Right		mm		
28	Specifications	Access Clearance Front		mm		
29	Specifications	Access Clearance Rear		mm		
30		**Performance Data**				
31	Specifications	ReferenceStandard		Text		
32		**Electrical Data (if required)**				
33	Specifications	Incoming Supply Electrical Voltage		Volts		
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36	Specifications	Motor Enclosure Rating		Text	IP numbers	
37	Specifications	Motor Type		Text		
38	Specifications	Number of Poles		Number	1,3	
39	Specifications	Motor Efficiency Class (CEMEP)		Text		
40	Specifications	Starting Method		Text	DoL,StarDelta, Soft	
41		**Controls**				
42	Specifications	BMS Links		Y/N		
43		**Sustainability**				
44	Sustainable Material	Embodied Carbon		kgCO2		
45	Sustainable Material	Life Cycle Analysis		Number	BREEAM	
46	Sustainable Material	Location of Manufacturer		GridRef	Northing,Easting	
47	Sustainable Material	Green Guide for Specification		Text	A - E	
48	Sustainable Material	Environmental Product Declaration		Text	3rd Party Verification	
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50	Sustainable Material ETL	URL to Energy Technology List		URL	Hyperlink to ETL webpage for product	
51	Sustainable Material LEED	Responsible Extraction of Materials		Text	TBA	
52	Sustainable Material LEED	Material Ingredient Reporting		Text	TBA	
53		**Operations & Maintenance**				
54	Facilities/Asset Management	URL to O&M Manual		Text	Hyperlink to Manufacturer O&M Data	
55	Facilities/Asset Management	Daily		Text	Maintenance tasks or SFG2012 codes.	
56	Facilities/Asset Management	Weekly		Text	Maintenance tasks or SFG2012 codes.	
57	Facilities/Asset Management	Monthly		Text	Maintenance tasks or SFG2012 codes.	
58	Facilities/Asset Management	Quarterly		Text	Maintenance tasks or SFG2012 codes.	
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PDT Notes

Add some Notes to help populate the fields.

PDT Units

Identify the Units of Measurement for each field.

PDT Construction
Maintenance tasks:
Identify SFG2012 code (if applicable)

PDT Construction

SPie attributes

Paste in the Attributes tab from the SPie spreadsheet (if available) and ensure that any non-project specific attributes are covered by the PDT fields.

Quality Assurance

Consultation and Approval process:

Create
- Professional body appoint Originating author
- Liaise with Manufacturers

Technical Approval
- Refer to Peers
- Liaise with Professional body Technical Committee

Consultation
- Issue for draft use
- Gather feedback and enact where appropriate

Issue
- Final Technical Committee sign off
- Approved for use

Annual Check
- Gather feedback and Review by Professional body
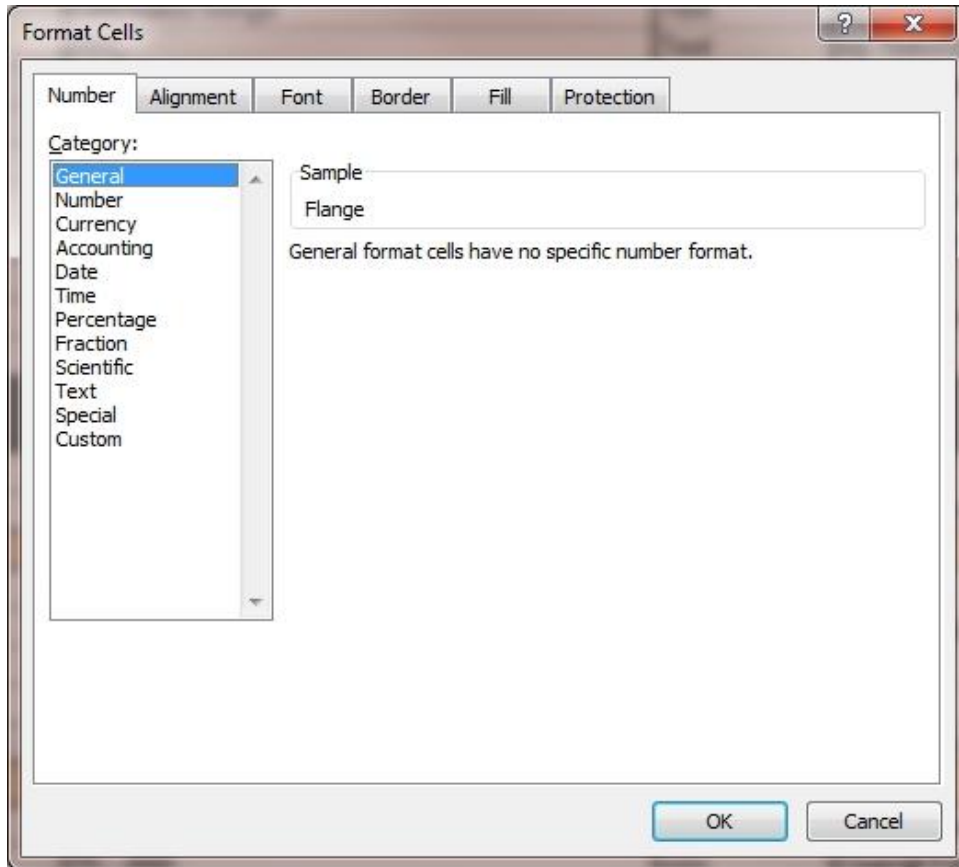- Changes approved by Technical Committee

While many other spreadsheet programs are available and may be used in creating PDTs, here are a few tips and tricks to use in Excel in writing them.

Limit format of responses

To limit the responses to a single data format, such as a number, or a percentage, you can format the cell to only accept this kind of data.
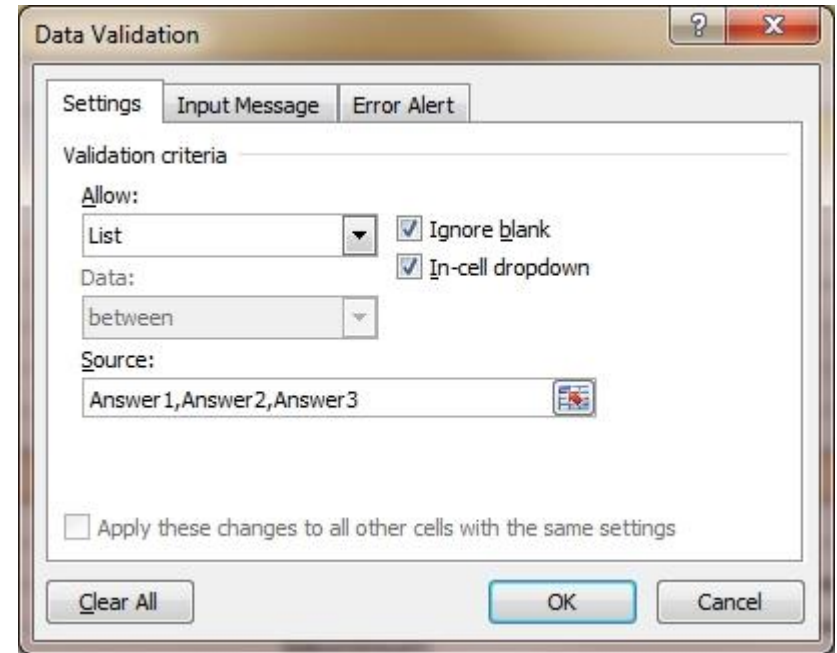
Remember that if the response could be either a range (1, ,3) or a list (1,2,3), the format has to be General.

Drop down lists

If the responses are to be from a list and only from that list i.e. no other response is possible, then you can use Data Validation (under the Data tab) to achieve this.
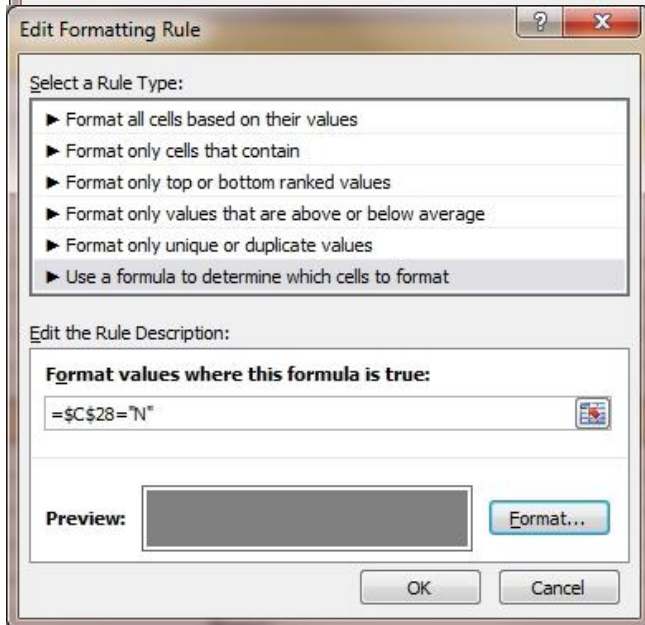
EXCEL TIPS AND TRICKS

Grey out rows

To grey out rows in response to an answer made elsewhere; highlight some or all of the cells affected and, using the Conditional Formatting option, apply a new rule.
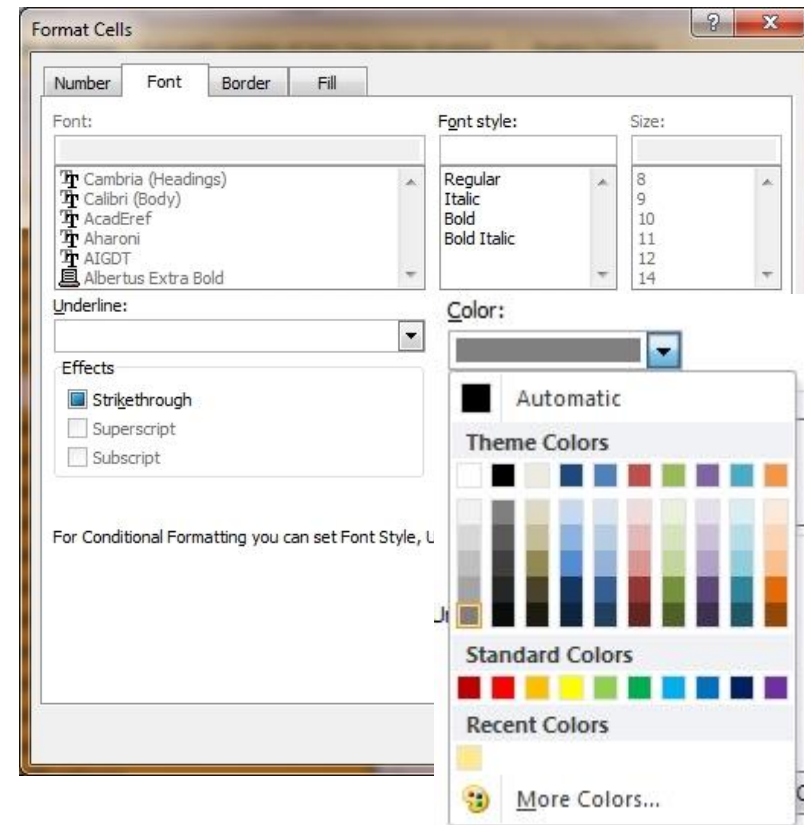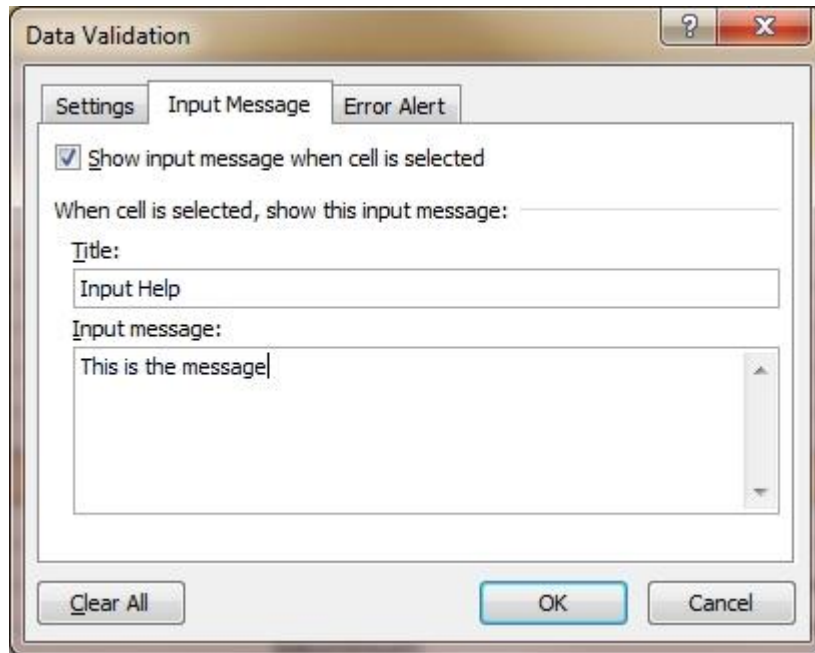
This works best if the trigger cell has a drop down list of options.

Colour the cell and the text font to grey in the formatting options, this has the effect of "Greying out" the cells.

Mouse-over help

To make a help message appear when the users mouse clicks on a cell, use Data Validation and select the Input Message option

This is how it looks: