



CPIx - IT ASSESSMENT FORM

Part 1 - General Information and Company Policies on Information Exchange

Part 1 of this questionnaire covers general policy issues on the exchange of electronic information within the firm.

1.1 - General Information

Please provide the following general information on your firm and your role on the project (if applicable) together with details of key personnel who are likely to be involved in information exchange.

1.1.1 - General and Project Information

Project Name*	
Company Name	
Role on Project*	
Your reference No for this project*	

1.1.2 - Organisation and Team Information

Team Member Position	Name	Telephone	Email
Project Leader / Partner in Charge			
CAD Manager			
IT Manager			
Other Roles (specify)			
Other Roles (specify)			
Other Roles (specify)			

* If known



1.2 - Project Information Production & Distribution Policies

Please indicate in the table below the information that you normally produce or are expecting to produce on the project. Also list the types and formats of information that you are prepared to share electronically with other project team members.

Information Production Information Type					Information Distribution			Information Sharing and Reuse		
	To be Produced on Project		Will be Distributed Electronically		Preferred Electronic Distribution Format			Will Permit Reuse		Limitations on Reuse by other Team members
	Y	N	Y	N	Software Vendor	Package	Version	Y	N	
Paper Drawings										
Sketch Drawings										
Survey Drawings										
Mark Ups										
Drawing Print Files										
2D BIM/CAD Models										
3D BIM/CAD Models										
3D Visualisations										
Specifications										
Schedules										
Bills of Quantities										
Correspondence										
Minutes of Meeting										
Diaries										
Reports										
Surveys										
Site Investigations										
Cost Plans										
Programmes										



Information Production		Information Distribution						Information Sharing and Reuse		
Information Type	To be Produced on Project		Will be Distributed Electronically		Preferred Electronic Distribution Format			Will Permit Reuse		Limitations on Reuse by other Team members
	Y	N	Y	N	Software Vendor	Package	Version	Y	N	
Requests for Information										
Change Orders										
Architects Instruction										
Valuations										
Photos										
Video										
Tender Documentation										
Tender Package Information										
Tender Submissions										
Tender Returns										
Other (please specify)										
Other (please specify)										
Other (please specify)										



1.3 Drawing & CAD Management

Please indicate the drawing and CAD modelling approaches that are used in your organisation. Give a rough indication as to the proportion of your outputs that use each method in a typical year.

1.3.1	Please indicate the drawing and CAD modelling approaches that are used in your organisation. Give a rough indication as to the proportion of your outputs that use each method in a typical year.	<i>Modelling Method</i>	Y/N	<i>% of Output</i>
1.3.2	Are your BIM/CAD models produced as 1:1 real world with accurate dimensions or do you draw to approximate size and adjust dimensions to suit?	<input type="checkbox"/> 1:1 & accurate dimensions <input type="checkbox"/> Approximate with adjusted dimensions		
1.3.3	Are standards used to produce your CAD /BIM models?	Yes No		
1.3.4	If so, what standard is used? Please describe briefly and attach a copy for reference purposes.			
1.3.5	Would it be acceptable for your organisation to adopt project specific CAD / BIM standards that are different from your current standards? Note any reservations that may apply.	Yes No		
1.3.6	Describe briefly how you resource the production of your CAD models.			
1.3.7	Describe briefly how your CAD operator skills are kept up to date.			



1.3.8	Do you use CAD for spatial and design coordination purposes?	Yes (please describe) No (please describe)
1.3.9	Describe briefly your drawing issue process and statuses and revisions for drawing issues normally used.	
1.3.10	Describe briefly your file and document numbering systems for your drawings and CAD models.	
1.3.11	Is your organisation willing to use project standard title blocks which are different to your in-house standard?	Yes No



1.4 Document Numbering Systems

Please give details of your in-house document numbering systems. If you have a suitable reference document please attach it.

--

1.5 Experience with Web-Based Project Tools

Please indicate your experience with web-based project tools such as extranets or web enabled document management systems.

--

Which project collaboration or web enabled document management tools have you worked with? Please list.

--

If so, what is your preferred project collaboration or web enabled document management systems? Please give any technical or commercial reasons to support your choice.

--

1.6 Professional Indemnity Limitations

Please describe any limitations placed on your ability to exchange electronic information by your PI insurers, eg a requirement to send parallel paper copies of electronic document. If you have a policy statement, please attach it for reference.

--



1.7 Email Distribution Policies

Do you have any policies regarding email usage on projects to ensure that all communications via email are controlled to reduce risk? If you have, please describe how this operates.

When using email on projects, do you have facilities to ensure that urgent emails are re-routed when project personnel are on holiday for example? If so, please describe.

1.8 Policies on Internet Usage

Please describe any policies your organisation has on limiting Internet usage. If you have a policy document, please attach for future reference.



Part 2 – Technical Information on Software and Systems

Part 2 of this questionnaire covers technical information. If you are the manager or partner responsible for the project you may wish to hand this part onto your technical expert or IT Department for completion of the information collation.

2.1 IT Infrastructure

Infrastructure Item	Description
Computer Local Area Network	
Wide Area Network	
Internet connection type and speed for main office. Advise number of users accessing connection.	
Internet connection type & speed for regional office (if applicable). Advise number of users accessing connection.	
Internet connection type and speed for local office (if applicable). Advise number of users accessing connection.	
Mobile access to Internet – describe	
Email System	
Wide format scanning, including A3 and colour scanning	
Wide format printing, including A3 and colour printing	
Narrow format colour printing	
Narrow format (A4)	



Infrastructure Item	Description
colour/black and white scanning	
Video conferencing	
Presentation facilities including LCD projector (advise lumens and resolution)	
Guest computer hosting facilities, including wireless internet access for guest users	
Website	
Intranet	
Extranet	



2.2 Operating Systems & Software Applications

Describe your operating systems and software applications as set out below. Include any software not listed for which you are likely to need export to other team members.

Operating System/Software Application	Software Vendor	Package	Version
Network Server Operating system			
PC Operating System			
Word Processing			
Spreadsheet			
Presentation			
Database			
Desktop Publishing			
Graphics			
Process Mapping			
2D CAD			
3D CAD			
Drawing Management Software			
PDF Writer			
PDF Reader			
Document management			
Internet Browser			
OCR			
Scanning			
Antivirus			
Firewall			
CAD Viewers and Model Browsers			
Analysis Software			
Design Software			



Operating System/Software Application	Software Vendor	Package	Version
Other (Specify)			
Other (Specify)			
Other (Specify)			
Other (Specify)			



2.3 Information Transport Capabilities

Describe your capabilities to transport and receive information transported to you in different formats. Add any transport formats that you use that are not listed below.

Transport Media	Write or Send		Read or Receive		Transport Media Description		Maximum File Size and Other Limitations
	Y	N	Y	N	Vendor	Package	
Email							
FTP							
CD							
CDRW							
DVD (Specify Type)							
Portable Hard Disc Drives (specify)							
USB Drives (specify)							
ZIP 100 Drives							
Zip 250 Drives							
Tape Drives							
Flash Memory Cards / Sticks							
Other Transport Media (specify)							
Other Transport Media (specify)							



2.4 Disaster Recovery Systems & Procedures

Briefly Describe your disaster recovery systems and procedures

2.5 Archiving Systems & Procedures

Briefly Describe your archiving systems and procedures

2.6 Security Systems

Describe your data security systems and arrangements.

Do you have an anti virus system that continuously monitors all your incoming and outgoing traffic?

Yes:

No:

----------------------	----------------------

If no, how do you currently protect your organisation against virus attack?

How often do you update your anti virus software?

Do you have systems for protecting against spyware and other covert activity logging systems?

Yes:

No:

----------------------	----------------------

Do you have a firewall system?

Yes:

No:

----------------------	----------------------



Is it a mainstream supplier or from another source?	
Mainstream:	Other:

What limitations does your firewall place on incoming and outgoing electronic communications? Please describe briefly.

Remarks/Comments

--

IT Assessment Completed By.....(Project/Company Assessor)
Date.....

Recommendation

Approved By.....(Director) Date.....

Director Comments

--