

# **BAS Access and Change Control process**

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**Rev: 1**



UNIVERSITY OF  
**TORONTO**

**Facilities & Services**

# BAS Access and Change Control process

DRAFT

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By: Facilities & Services

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## **1 PURPOSE**

The purpose of this procedure is as follows:

1. Ensure Facilities & Services is fully aware of any changes that are taking places: when, what and why.
2. Ensure the changes are done in a controlled manner.
3. All Access and Changes are pre-approved by U of T when applicable.

## **2 APPLICATION**

This document outlines the general process to be followed for any work on the Building Automation System (BAS) for projects/systems where BAS is completely or partially turned over to U of T.

The BAS system is considered to be completely or partially turned over to U of T if either one of the following is true:

- a) BAS being completely or partially connected to the F&S Network,
- b) If Utilities and Operations are already using the BAS in any shape or form for operation of mechanical systems on BAS.

This is applicable for outside contractors and in-house groups.

### 3 PROCESS

#### 3.1 STEP 1: CONTRACTOR REQUEST ACCESS FOR CERTAIN PERIOD OF DATA AND FILLS IN THE FORM.

#### 3.2 STEP 2: ACCESS DURING REGULAR HOURS:

- a) Before commencement of any work contractor sends a **SIGN-IN** email to following people:
  - a. F&S, IT Manager
  - b. F&S, BAS manager
  - c. F&S, BMS Senior Manager
  - d. F&S, affected BMS Area manager
- b) The **Sign – In** email shall contain the following details:
  - a. The subject line should include the following: Sign-In, building number & name, AR##\_\_\_. (AR number format (AR# PXXX-XX-XXX-AAA-BBB)  
*PXXX-XX-XXX= UoT project Number AAA=vendor code (JCI / SIE / HON / CTS) BBB=Request number*
  - b. The email shall advise what work is being planned and estimated duration.
  - c. If the work may affect the existing system operations but is not planned to make any changes to the components or major impact, sequence or points– such as during commissioning or testing, the email should clearly outline that.
  - d. If the work performed during approved access time would require pre-approval from the U of T – the communication including that pre-approval should be completed prior to accessing the site. The examples of these activities requiring pre-approval are as follows:
    - i. Adding new points to BAS.
    - ii. Changing point numbers – deletion of introducing new points.
    - iii. Revision of sequence of operations.
    - iv. Revision of programming.
    - v. Shut down of the systems - U of T Shut down notices process needs to be followed as well.
  - e. If the work would involve changes then the email needs to include the change request form.
- c) Only upon receipt of the confirmation email from the U of T access approver (refer to related request form) the access can be considered granted.
- d) Upon completion of the work the **Sign – Out** email shall be sent to following people:
  - a. F&S, IT Manager
  - b. F&S, BAS manager
  - c. F&S, BMS Senior Manager
  - d. F&S, affected BMS Area manager
- e) The **Sign-Out** email shall contain the following details:
  - a. It should contain the original Sign-In email thread.
  - b. The subject line should be changed to the following: Sign-Out, building number & name, AR#\_\_.
  - c. The email shall provide an update on the work that was completed. If the work involved changes then the email needs to include the new or updated change request form.

### 3.3 STEP 2: ACCESS OUTSIDE OF REGULAR HOURS:

- a) Before commencement of any work contractor **signs at CSP with building shift engineer** and sends a **SIGN –IN** email to following people:
  - a. F&S, IT Manager
  - b. F&S, BAS manager
  - c. F&S, BMS Senior Manager
  - d. F&S, affected BMS Area manager
- b) The **Sign – In** email shall contain the following details:
  - a. The subject line should include the following: Sign-In, building number & name, AR#\_\_\_\_.(AR number format (AR# PXXX-XX-XXX-AAA-BBB)  
*PXXX-XX-XXX= U of T project Number AAA=vendor code (JCI / SIE / HON / CTS) BBB=Request number*
  - b. The email shall advise what work is being planned and estimated duration.
  - c. If the work may affect the existing system operations but is not planned to make any changes to the components or major impact, sequence or points– such as during commissioning or testing, the email should clearly outline that.
  - d. If the work performed during approved access time would require pre-approval from the UofT – the communication including that pre-approval should be completed prior to accessing the site. The examples of these activities requiring pre-approval are as follows:
    - i. Adding new points to BAS.
    - ii. Changing point numbers – deletion of introducing new points.
    - iii. Revision of sequence of operations.
    - iv. Revision of programming.
    - v. Shut down of the systems - U of T Shut down notices process needs to be followed as well.
  - e. If the work would involve changes then the email needs to include the change request form.
- c) Only upon receipt of the confirmation email from the U of T access approver (refer to related request form) the access can be considered granted.
- d) Upon completion of the work contractor **signs-out at CSP with building shift engineer** and sends the **Sign – Out** email to following people:
  - a. F&S, IT Manager
  - b. F&S, BAS manager
  - c. F&S, BMS Senior Manager
  - d. F&S, affected BMS Area manager
- e) The **Sign-Out** email shall contain the following details:
  - a. It should contain the original Sign-In email thread.
  - b. The subject line should be changed to the following: Sign-Out, building number & name, AR#\_\_\_\_.

The email shall provide a detailed update on the work that was completed. If the work involved changes then the email needs to include the new or updated change request form.