



YOUR PRODUCT. YOUR GUIDE.

Installation Guide

Survey, prepare, install, verify, and hand over

5 PAGES / FILLABLE FIELDS / COMPLIANCE REVIEW



Make this document yours

Product / system name

Name used on the product or release

Model / version / configuration

Exact models and versions covered

Document ID and revision

Controlled reference and revision number

Issue date and market

Date, language and countries covered

Responsible manufacturer / organization

Your organization's legal name and address

Author and support contact

Document owner, support email / phone / URL

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Authoring draft: fill the labeled fields, replace bracketed prompts, and add verified procedures and diagrams. Complete product and market review before release. This template does not certify a product.

DEFINE WHAT THIS GUIDE COVERS

Project, product, and installer scope

An installation guide must identify the site and product configurations it supports. Separate the installer scope from design decisions, local approvals, and user operation.

Document and responsibility**Responsible manufacturer or organization**

[Legal name], [address], [technical support phone / email / website]

System and model coverage

[Product name], [model, option, serial range]

Controlled document

[Document ID], [revision], [issue date], [language]

Markets, site type, and installer

[Applicable markets], [site class], [required qualifications]

Scope and prerequisites

State the installation tasks covered, interfaces required from other trades, and work excluded from this guide. Identify approved drawings, site plans, and current specifications by number and revision. Explain who resolves conflicts between site conditions and product requirements before work begins.

Pre-installation authorization

- ☐ Confirm the product model and approved configuration.
- ☐ Review current drawings, risk controls, and site permits.
- ☐ Verify the installer qualification and assigned work scope.
- ☐ Confirm that required utilities, supports, access, and clearances are available.
- ☐ Stop and request direction when site conditions fall outside approved limits.

Template status

Manual Tools by Manuals+ provides this template at <https://manual.tools>. It is not an approved installation design. The responsible organization and project authority must verify requirements and site-specific instructions.

RESOLVE CONDITIONS BEFORE INSTALLATION

Survey the site and prepare the work

Give the installer a way to compare the actual site against verified acceptance criteria. Identify hazards, interfaces, lifting needs, and required isolation before equipment is moved.

Site verification

Condition	Approved criterion / source	Record or disposition
Mounting surface	[Drawing / specification]	[Record]
Utility or network interface	[Approved requirement]	[Record]
Clearance and access	[Verified requirement]	[Record]
Environmental condition	[Verified range]	[Record]

Work planning and isolation

Identify energy sources, stored energy, hazardous materials, traffic, overhead loads, and other installation risks supported by the site assessment. State how equipment must be isolated, secured, lifted, or protected. Name required permits and coordination with other trades, and assign the person responsible for each hold point.

Prepare for installation

1. Inspect delivered equipment and record serial and configuration details.
2. Compare site measurements and interfaces with the current approved drawings.
3. Stage listed tools, approved materials, lifting aids, and protective measures.
4. Isolate or control hazards using the site-authorized procedure.
5. Record any deviation and obtain written disposition before proceeding.

Site record**Site / project identifier**

[Site, area, work order, date]

Deviation and disposition record

[Issue, evidence, approver, disposition ID]

Hold-point owner

[Name, role, contact]

USE APPROVED SEQUENCE AND CHECKS

Install, verify, and hand over

List actions in a safe order and tie each acceptance check to an approved criterion. Separate installer verification from commissioning or operation performed by another role.

Installation sequence

1. Position or mount the equipment using the specified supports and lifting points.
2. Connect interfaces in the approved order using identified materials and tools.
3. Secure guards, covers, seals, fasteners, and protective features as specified.
4. Perform inspection and electrical, mechanical, network, or leak checks that apply.
5. Record test results and obtain release authorization before energizing or handoff.

Acceptance and commissioning

Name the required test method, instrument or software version, acceptance limit, and evidence record for every critical check. Do not invent torque, pressure, clearance, voltage, or network values. Explain how failures are documented, isolated, corrected, retested, and approved.

Handoff package

Record	Owner	Completed reference
As-installed configuration	[Role]	[Record ID]
Inspection and test results	[Role]	[Record ID]
Open items / disposition	[Role]	[Record ID]
User training and documents	[Role]	[Record ID]

No informal acceptance

Do not treat successful power-on or visual appearance as acceptance unless the approved criteria say so. Keep the equipment in its safe state until required checks and sign-offs are complete.

REVIEW PRODUCT AND SITE OBLIGATIONS

Installation compliance and approval

Installation rules may involve product standards, building or electrical codes, permits, qualified labor, local language, and site safety. Map each obligation to an owner and evidence source.

Applicable requirements and interfaces

Determine which product and installation requirements apply in each intended market and site class. Reference current, controlled drawings, declarations, permits, and local authority instructions. Document where the installer must follow separate trade-specific instructions and how conflicts are escalated.

Product-specific compliance author prompts

- ☐ Identify applicable product, electrical, structural, environmental, accessibility, language, and installation requirements for each market.
- ☐ Insert only verified equipment labels, ratings, declarations, site limits, and qualification requirements.
- ☐ List site survey, installation, inspection, commissioning, permit, and test evidence by record ID.
- ☐ Obtain appropriate technical, safety, legal, installer, and authority review before release.

Controlled release record**Responsible organization and contact**

[Legal name, address, technical support contacts]

Markets, configuration, and revision

[Markets], [models/site classes], [document ID], [revision / date]

Evidence and declaration references

[Drawing, permit, test, label, and report IDs]

Review and sign-off

[Reviewer / role, date, decision, approval record]

Release gate

This Manual Tools by Manuals+ template at <https://manual.tools> does not verify an installation or establish regulatory compliance. The responsible organization and installation authority must review the actual site, product, and evidence.

Official reference starting points - applicability must be determined for your product and market.

Your Europe: product compliance

OSHA: control of hazardous energy