

# “Documentation” specifications of work and services

Version 3.0

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## Contents

Introduction.....	3
Scope .....	4
General requirements.....	4
Priority of the equipment regulations of the ultimate customer .....	4
Documentation contact.....	4
Deadlines .....	4
Scope of supplies .....	5
Form of delivery.....	7
Delivery on paper.....	7
Necessity of documentation in paper form .....	7
Requirements in the event of delivery on paper.....	9
Printing service by EMAG .....	10
Delivery on data carrier .....	14
Formats .....	16
Language .....	16
Delivery .....	17
Further processing .....	17
Review of documentation and payment release.....	18
Reason for required exceptions.....	19

## Introduction

This specifications of work and services document is the for the delivery of documentation to the companies of the EMAG Group, subsequently called EMAG in short, identified as brands on the website ([www.emag.com](http://www.emag.com) > Companies > Brands). It contains specifications for structuring, version, implementing and delivering documentation, and provides information on the equipment regulations to be observed by ultimate customers of EMAG.

## Scope

The specifications in this specifications of work and services document apply to the product documentation that shall be provided together with delivery products requiring compulsory documentation.

## General requirements

The documentation of delivery products shall be carried out in accordance with the requirements of EC Machinery Directive 2006/42/EC by January 19, 2027, and in accordance with the specifications of EU Machinery Regulation (EU) 2023/1230 as of January 20, 2027, insofar as this applies to the delivery product.

Documentation requirements in DIN EN ISO 12100, EN 60204 and EN 82079 are to be complied with.

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## Priority of the equipment regulations of the ultimate customer

The equipment regulations of the ultimate customer of EMAG take precedence over this specifications of work and services document. In this respect, parts of this specifications of work and services document shall be supplemented and/or replaced by the equipment regulations of the ultimate customer. Equipment regulations of the ultimate customer to be complied with are listed in the purchase order. It is the responsibility of the supplier to obtain these equipment regulations, interpret them in accordance with the requirements of the ultimate customer of EMAG, and implement them.

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## Documentation contact

The supplier shall appoint a contact for all questions relating to the documentation of delivery products. The contact is technically competent in the field of technical documentation and authorized to make decisions regarding the implementation of the documentation.

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## Deadlines

The delivery deadlines for the documentation of delivery products are generally given in the purchase order.

If the delivery product requires installation plans and drawings of parts that come into contact with the workpiece (detailed drawings, tool plans), these shall always be submitted in advance for approval.

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Further intermediate deliveries may be required due to the equipment regulations of the ultimate customer. In this case, the complete documentation shall be supplied in the required language or languages for acceptance and/or preliminary acceptance. In addition, the complete documentation shall then be supplied in its final version by the date specified in the purchase order.

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## Scope of supplies

If applicable to the delivery product, at least the following documents currently adapted to the delivery product shall be provided:

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• <u>EC Declaration of Conformity</u> (for complete machines in accordance with the EC Machinery Directive (until January 19, 2027) or the EU Machine Regulation (as of January 20, 2027) and all delivery products with CE marking)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• <u>EC Declaration of Incorporation</u> (for incomplete machines in accordance with the EC Machinery Directive (until January 19, 2027) or the EU Machine Regulation (as of January 20, 2027))	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• <u>Risk assessment</u> (for machines in accordance with the EC Machinery Directive (until January 19, 2027) or the EU Machine Regulation (as of January 20, 2027))	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• <u>Test certificates</u> for safety components, lifting equipment, lifting gear (e.g. pressure accumulators, safety valves, transport crossbars, belts, ropes, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• <u>Safety data sheets</u> for media used (e.g. coolants, lubricants, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• <u>Acceptance test report</u> with the actual parameters of the delivery product achieved during production (for delivery products within the scope of the EC Machinery Directive) (until January 19, 2027) or the EU Machine Regulation (as of January 20, 2027))	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• <u>Instructions</u> (as applicable to the delivery product):			
- Transport instructions with notes on packaging and storage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Installation instructions / assembly instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Start-up instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Operating instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Programming instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Maintenance manual...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
... with maintenance schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
... with information on maintenance cycles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
... with information on the duration of the maintenance activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
... with information on required material and on (special) tools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
... with information on the required qualifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Service and repair instructions ("First Level Guide")	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Information on shutdown and professional disposal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



## Form of delivery

The documentation is to be provided in printed form on paper and electronically on data carrier (CD, DVD or USB stick) in the quantity requested in the purchase order.

### *Delivery on paper*

#### **Necessity of documentation in paper form**

Why is a delivery on paper still required?

##### Case 1: EC Machinery Directive 2006/42/EC (until January 19, 2027)

The Machinery Directive does not make any direct statement on the medium on which the documentation is to be provided. For this reason, there were many discussions on whether paper could be dispensed with. However, note the following:

- In Appendix I, Section 1.7.4 ff, the Machinery Directive refers to documentation under the term "operating manual" and reveals that the term "operating manual" does not only refer to safety chapters or manuals, but also includes plans and diagrams, spare parts information, and other documents. General speaking: all information that the user of the delivery product requires to be able to use it safely.

Since the "operating manual" described in this scope is listed under the title "Basic health and safety requirements for the design and construction of machinery" in Appendix I of the Machinery Directive, the entire "operating manual" is safety-relevant according to the Machinery Directive.

The relevant standard in machine construction, DIN EN ISO 12100 "Safety of machinery - General principles for design," addresses the topic of documentation under "6.4 User information" and demands under "6.4.5.3 Drafting and issuing of user information," Section e), that safety-relevant information must also be "always also be available in printed form" when provided digitally.

Some are of the opinion that the application ahead of schedule of the requirements of EU Machinery Regulation (EU) 2023/1230, Article 10, Paragraph 7, which will come into force on January 20, 2027, relating to digital documentation already enables paperless documentation under EC Machinery Directive 2006/42/EC. This is also indicated in the "Guideline on the application of Machinery Directive 2006/42/EC" as of edition 2.3 (April 2024), §255. However, this approach overlooks the following:

- At the time of the compilation of this guideline, hardly any companies are already able to meet the requirements of EU Machinery Regulation (EU) 2023/1230, Article 10, Paragraph 7 (see Case 2 below).
- An agreement based on this article of the Machinery Directive also enables the purchaser to request documentation in paper form to be provided free of charge within one month of the date of purchase.
- DIN EN ISO 12100 must still also be observed.

It is therefore unavoidable in the case described here that the documentation is ultimately also made available to the user in paper form.

### Case 2: EU Machinery Regulation (EU) 2023/1230 (as of January 20, 2027)

The Machinery Regulation stipulates in Article 10, Paragraph 7, Clause 2 for "machinery and related products" and in Article 11, Paragraph 7, Clause 2 for "incomplete machinery" that the "operating manual" or "assembly instructions" can be supplied in digital form. However, digital delivery is linked to the following conditions:

- It must be stated on the delivery product how to access the digital documentation
- The digital documentation must be provided in a format that enables the user to print, download, and store the documentation on an electronic device so that they can access it at any time, in particular in the event of a failure of the delivery product.
- It must be ensured that the digital documentation can be accessed online during the expected service life of the delivery product and for at least ten years after the delivery product has been placed on the market. The requirements of the Machine Regulation regarding cybersecurity (certification) shall be observed.
- At the request of the purchaser, the supplier shall make the documentation available at the time of the purchase within one month free of charge in paper form.

Provided it can be assumed that DIN EN ISO 12100 has also been updated in terms of the digital delivery form of documentation by the time the Machinery Regulation becomes mandatory on January 20, 2027, paperless delivery of the documentation will be possible as of January 20, 2027. The supplier shall however provide proof in advance that they meet the Machinery Regulations linked there.



## Requirements in the event of delivery on paper

The documentation shall be supplied in workshop-suitable folders with a 4-ring mechanism.

The components of the documentation are to be provided as follows, split up into separate folders:

- Certificates and reports
- Manuals
- Plans
- Drawings and lists
- Documents from sub-suppliers
- Training material

The contents of the folders shall be split up practically using registers.

Each folder must include the following contents:

- Complete overview of all folders of the documentation
- Contents of the current folder

At least the following information shall be provided on the spline of the folder, and the relevant purchaser or the Documentation department of EMAG shall provide the supplier with the information on the EMAG machine and the ultimate customer:

- Folder: No.
- Folder: Contents (e.g. drawings)
- Information on the manufacturer: Name
- Information on the manufacturer:
  - Product name (e.g. measuring machine type AX17)
- Information on the manufacturer: Serial number
- Information on the EMAG machine:
  - EMAG machine number (e.g. 123456)
- Information on the ultimate customer: Name and place (e.g. Daimler AG, Berlin)
- Information on the ultimate customer: Project name (e.g. "Bearing plate")
- Information on the ultimate customer: Inventory no. / equipment no.

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## Printing service by EMAG

If the supplier provides the documentation in paper form in such a way that EMAG is involved as the printing service provider, this option is possible in individual cases after consultation with EMAG. However, the following conditions must be met:

- The requirements in the "Formats" chapter of this specifications of work and services document are met.
- The files to be printed do not have mixed page formats (for example, not pages 1-20 in DIN A4 format and pages 21-25 in DIN A3)
- Documents are stored as separate files, no summaries (e.g. not all reports in one PDF file)
- Apart from German umlauts (ä,ö,ü), no special characters may be used in the path name or file name.
- The files to be printed are not password-protected
- Excel files may only have 1 tab per file

The following shall also be observed in terms of data structure:

The inventory no. / equipment no. of the ultimate customer shall be used as the name of the data carrier and as the root directory of the data to be printed.

If it is not available, then use the EMAG machine number.

The components of the documentation are to be provided on data carrier as follows, split up into areas:

- Certificates and reports
- Manuals
- Plans
- Drawings and lists
- Documents from sub-suppliers
- Training material

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Each paper folder to be created within an area is marked by an index with "Volume\_x-" (x stands for a number 0...9) in the index name.

Each index page to be inserted into a paper folder is marked with a subdirectory with the index label "Rxx\_" (x stands for a number 0...9). (Pay attention to underscores – "R01\_" creates an index page, "R01-" does not create an index page)

Each separator sheet to be inserted within an index is marked with a subindex with the separator sheet label "Txx sh\_" (x stands for a number 0...9), followed by the text to be printed on the separator sheet. (Pay attention to underscores – "T01-sh\_" creates a separator sheet, "T01-sh-" does not create a separator sheet)

Each paper folder to be created must include the following contents:

- Complete overview of all folders of the documentation
- Contents of the current folder

The structure of the data to be printed must therefore exactly match the desired printout, as the entire data is automatically evaluated and sent to the printing machine in a single printing process. Errors in the data structure will therefore result in errors in the printout, meaning that for the process, it is essential that the supplier provides checked data.

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# Print data example:

123456

(inventory no. / equipment no. / mach. no.)

Part_1-Certificates-reports	
Volume_1-Certificates-reports	(new folder)
R00a-Content overview	(no index page)
Content overview.pdf	
R00b-Contents	(no index page)
Contents.pdf	
R01_EC declaration of conformity	(new index page)
ConformityOfDeclaration.pdf	
R02_Risk assessment	(new index page)
Risk_assessment.pdf	
R03_Fluid system	(new index page)
T01-sh_Pressure accumulator	(new "Pressure accumulator" separator sheet)
Pressure_accumulator.pdf	
T02-sh_Coolant	(new "Coolant" separator sheet)
Coolant.pdf	
R04_Electrical system	(new index page)
Report_60204.pdf	
R05_...	(new index page)
Part_2-Instructions	
Volume_1-Instructions	(new folder)
R00a-Content overview	
R00b-Contents	
R01_Transport instructions	
R02_Start-up instructions	
R03_...	
Part_3-Plans	
Volume_1-Plans	
R00a-Content overview	
R00b-Contents	
R01_...	
Part_4-Drawings-lists	
Volume_1-Drawings-lists	
R00a-Content overview	
R00b-Contents	
R01_...	
Part_5-Sub-suppliers	
Volume_1-Sub-suppliers	
R00a-Content overview	
R00b-Contents	
R11_Supplier 1 (e.g. BASF)	
R11_Supplier 2 (e.g. Rexroth)	
R11_...	
Part_6-Training material	
Volume_1-Training material	
R00a-Content overview	
R00b-Contents	
R01_...	

The data carrier for the data to be printed shall be labeled at least with the following information, and the relevant purchaser or the Documentation department of EMAG shall provide the supplier with the information on the EMAG machine and the ultimate customer:

- CD/DVD/USB stick: No./quantity (e.g. DVD 1/2)
- CD/DVD/USB stick: Content (e.g. documentation)
- Information on the manufacturer: Name
- Information on the manufacturer:
  - Product name (e.g. measuring machine type AX17)
- Information on the manufacturer: Serial number
- Information on the EMAG machine:
  - EMAG machine number (e.g. 123456)
- Information on the ultimate customer: Name and place (e.g. Daimler AG, Berlin)
- Information on the ultimate customer: Project name (e.g. "Bearing plate")
- Information on the ultimate customer: Inventory no. / equipment no.

The data carriers shall be printed. Adhesive labels are not permitted.

The commercial details of the "Printing service by EMAG" option are to be coordinated with our Purchasing department.

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## Delivery on data carrier

The files shall be stored in the following structure:  
(If the "Printing service by EMAG" option is used, the data structure described there can also be used as an option.)

The inventory no. / equipment no. of the ultimate customer shall be used as the name of the data carrier and as the root directory of the data carrier.  
If it is not available, then use the EMAG machine number.

The sub-directories represent the folder structure and folder contents of the printed documentation.

Example:

123456

- 01\_ Certificates and reports
  - 01-01\_ EC declaration of conformity
  - 01-02\_ Risk assessment
  - 01-03\_ ...
- 02\_ Instructions
  - 02-01\_ Transport instructions
  - 02-02\_ Start-up instructions
  - 02-03\_ ...
- 03\_ Plans
  - 03-01\_ ...
- 04\_ Drawings and lists
  - 04-01\_ ...
- 05\_ Sub-suppliers
  - 05-01\_ Supplier 1 (e.g. BASF)
  - 05-02\_ Supplier 2 (e.g. Rexroth)
  - 05-03\_ ...
- 06\_ Training material
  - 06-01\_ ...

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The documents are to be stored as separate files.  
Summaries (e.g. all reports in one PDF file) are not permitted.

The data carriers shall be labeled at least with the following information, and the relevant purchaser or the Documentation department of EMAG shall provide the supplier with the information on the EMAG machine and the ultimate customer:

- CD/DVD/USB stick: No./quantity (e.g. DVD 1/2)
- CD/DVD/USB stick: Content (e.g. documentation)
- Information on the manufacturer: Name
- Information on the manufacturer:  
    Product name (e.g. measuring machine type AX17)
- Information on the manufacturer: Serial number
- Information on the EMAG machine:  
    EMAG machine number (e.g. 123456)
- Information on the ultimate customer: Name and place (e.g. Daimler AG, Berlin)
- Information on the ultimate customer: Project name (e.g. "Bearing plate")
- Information on the ultimate customer: Inventory no. / equipment no.

The data carriers shall be printed. Adhesive labels are not permitted.

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## Formats

The documentation shall be provided in the following formats:

	Paper	CD or DVD or USB stick
Certificates and reports	DIN A4	.PDF
Manuals	DIN A4	.PDF + .DOCX
Plans:		
Space assignment plan	DIN A3 (folded to DIN A4)	.TIF
Transport plan	DIN A3 (folded to DIN A4)	.TIF
Electrical wiring diagram	DIN A4	.PDF
Fluid diagrams	DIN A4	.PDF
Drawings	DIN A3 (folded to DIN A4)	.TIF + .DWG
Lists	DIN A4	.XLSX

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## Language

The documentation (at least all documents of the operating manual or assembly instructions in accordance with the EC Machinery Directive or EU Machinery Regulation) shall be provided in the official language of the member state in which the delivery product is placed on the market (German).

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The documentation of the delivery product shall also be provided in the official language of the member state in which EMAG places the overall machine on the market (language of the ultimate customer of EMAG).

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The language variants must be identical in terms of content (same issue date or same version).

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## Delivery

The documentation shall be sent as a separate packaging unit to the address given in the purchase order, "Documentation" department:

At least the following information shall be provided on the shipping box, and the relevant purchaser or the Documentation department of EMAG shall provide the supplier with the information on the EMAG machine and the ultimate customer:

- Box contents: "Documentation" label
- Information on the manufacturer: Name (sender)
- Information on the manufacturer:
  - Product name (e.g. measuring machine type AX17)
- Information on the manufacturer: Serial number
- Information on the EMAG machine:
  - EMAG machine number (e.g. 123456)
- Information on the ultimate customer: Name and place (e.g. Daimler AG, Berlin)
- Information on the ultimate customer: Project name (e.g. "Bearing plate")
- Information on the ultimate customer: Inventory no. / equipment no.

At least the following information shall be provided on the delivery note:

- Information on the manufacturer: Name (sender)
- Information on the EMAG machine:
  - EMAG machine number (e.g. 123456)
  - or EMAG project number (e.g. P-30012345.010000)

Deliveries with incomplete information cannot be correctly assigned and will be rejected and sent back at the sender's expense.

## Further processing

The supplier shall grant EMAG the approval to further process the documentation of the delivery product as follows:

- Storage, archiving
- Copying
- Printing
- Electronic processing
- Forwarding to external service providers (e.g. for translation into other languages)
- Integration into the EMAG customer documentation and forwarding to our customers
- Use in customer training courses

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## Review of documentation and payment release

The delivery product shall be interpreted as not having been delivered in full until the accompanying documentation has been delivered in full and without errors and the correct implementation has been checked.

If no equipment regulations of the ultimate customer are to be taken into account, the review shall be carried out by EMAG (Engineering and Documentation departments). If equipment regulations of the ultimate customer are to be taken into account, the review shall be carried out by the ultimate customer).

Full payment of the delivery product shall only be made after the documentation review has been successfully completed

The supplier is obliged to correct any mistakes found in the documentation free of charge, even after full payment has been made.

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## Reason for required exceptions

Items in this specifications of work and services document marked with AG (exception required) are accounted for as follows:

The requirements of this specifications of work and services document shall become part of the contract as given above.

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Date, supplier signature

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Date, EMAG signature