

O&M manual template: contents checklist for installers

A contents checklist for the operation and maintenance manual you hand over with an installed system, so nothing the client's operator or maintainer needs is left out.

Project	Site	Completed by	Date
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1. Manual details

1.1 Project and site **Required**

1.2 Systems covered **Required**

☐ Solar PV
 ☐ Battery storage
 ☐ EV charging
 ☐ BMS and controls
 ☐ Fire and security
 ☐ IT and network
 ☐ Electrical
 ☐ Heating and cooling

1.3 Version **Required**

e.g. Draft 1, Issue for handover, Rev A.

1.4 Issued to **Required**

Client, facilities manager or operator.

1.5 Format **Required**

☐ Digital
 ☐ Printed
 ☐ Both

2. System description

2.1 Description of each system **Required**

What it does, how it's arranged, and how it connects to the rest of the building.

2.2 Where the plant and equipment are **Required**

Plant rooms, roofs, car park bays, isolators.

2.3 As-installed drawings and schematics **Required**

FILE UPLOAD

3. As-installed product schedule

Every product actually fitted, not the design schedule.

3.1 Product schedule **Required**

Export from your product records, or attach a spreadsheet.

FILE UPLOAD

3.2 Schedule completeness **Required**

CHECKLIST GRID

Check	Complete	Partial	N/A
Make and model for every product	☐	☐	☐
Serial number for every serialised product	☐	☐	☐
Location of every product	☐	☐	☐
Firmware or configuration recorded	☐	☐	☐
Supplier for every product	☐	☐	☐
Manufacturer data sheets and manuals attached	☐	☐	☐

3.3 What's missing

↳ Shown when any row is Partial

NOTES

3.4 Recommended spares and consumables

NOTES

4. Test and commissioning records

4.1 Records included **Required**

CHECKLIST GRID

Check	Included	To follow	N/A
Electrical installation certificates	☐	☐	☐
Commissioning record for each product	☐	☐	☐
Witnessed test records	☐	☐	☐
Grid connection or network operator correspondence	☐	☐	☐
Scheme or compliance certificates	☐	☐	☐
Closed snag list	☐	☐	☐

4.2 Records to follow, and when

↳ **Shown when any record is To follow**

NOTES

5. Operation and maintenance

5.1 Procedures included **Required**

CHECKLIST GRID

Check	Included	N/A
Normal operation	☐	☐
Start-up and shutdown	☐	☐
Safe isolation	☐	☐
Emergency procedures	☐	☐
Fault finding	☐	☐
Hazards and residual risks	☐	☐

5.2 Maintenance schedule **Required**

Task, frequency and who does it, from the manufacturers' requirements.

FILE UPLOAD

5.3 Service contract in place **Required**

☐ Yes ☐ No

YES / NO

5.4 Service contract details

Provider, scope, start date, visit frequency.

↳ Shown when Service contract in place is Yes

TEXT

6. Warranties and contacts

6.1 Warranty schedule **Required**

Each warranty with product, start date, expiry and how to claim.

FILE UPLOAD

6.2 Manufacturer warranties registered **Required**

YES / NO

☐ Yes ☐ No

6.3 Installer contact for faults and service **Required**

TEXT

6.4 Supplier and manufacturer contacts

NOTES

7. Statutory information and issue

Separate duties that often draw on the same records.

7.1 Project has a principal designer or principal contractor under CDM

YES / NO

☐ Yes ☐ No

7.2 Information for the health and safety file sent to

↳ Shown when the project has a principal designer or principal contractor

TEXT

7.3 Regulation 38 fire safety information applies

CHOOSE ONE

☐ Yes ☐ No ☐ Not sure: ask the main contractor

7.4 Fire safety information supplied via

↳ Shown when Regulation 38 applies is Yes

TEXT

7.5 Checked and issued by **Required**

SIGNATURE

7.6 Date issued **Required**

DATE

