# ProductIP
# Platform Quick Guide

## Create a Technical file

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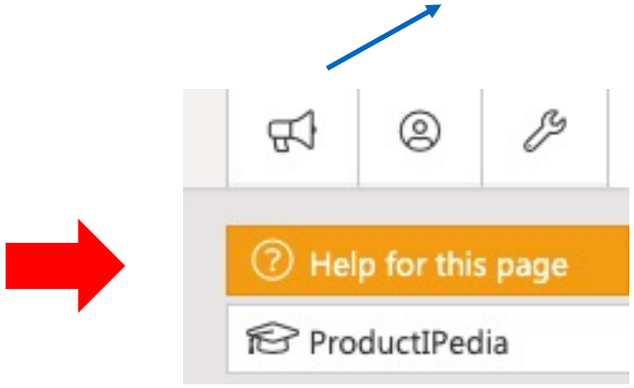
# Need help?:

When you have logged in click here:
For more information and instructions.

Or send an email to:
helpdesk@productip.com

English
中国
Nederlands
Deutsch

Overview of latest updates of the platform




Flow of creating a Technical file:
Step:

1. Create a TCF
2. Upload the documents you have
3. Ask your supplier for more documents
4. Review and link the documents
5. Create a CE declaration (if applicable)



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# THE PLATFORM IN A NUTSHELL:

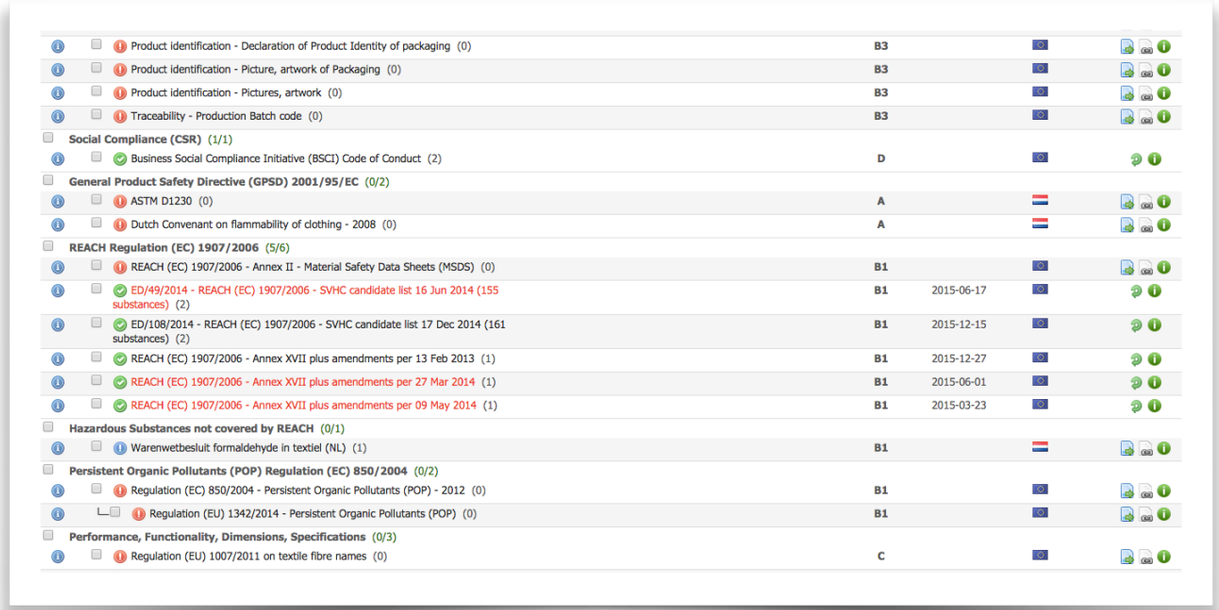
Create:
The platform supports you with the creation of a technical dossier containing all information about the compliance of your product.
The file contains the requirements your product has to comply with.

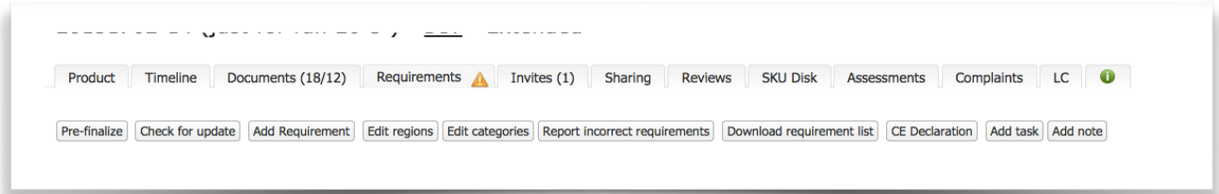
Manage:
Invitations to upload documents are sent from the platform.
MatchIt is our unique solution for cleverly linking documents to requirements.
This creates an overview of the substantiation.
All activities are recorded in the Timeline.

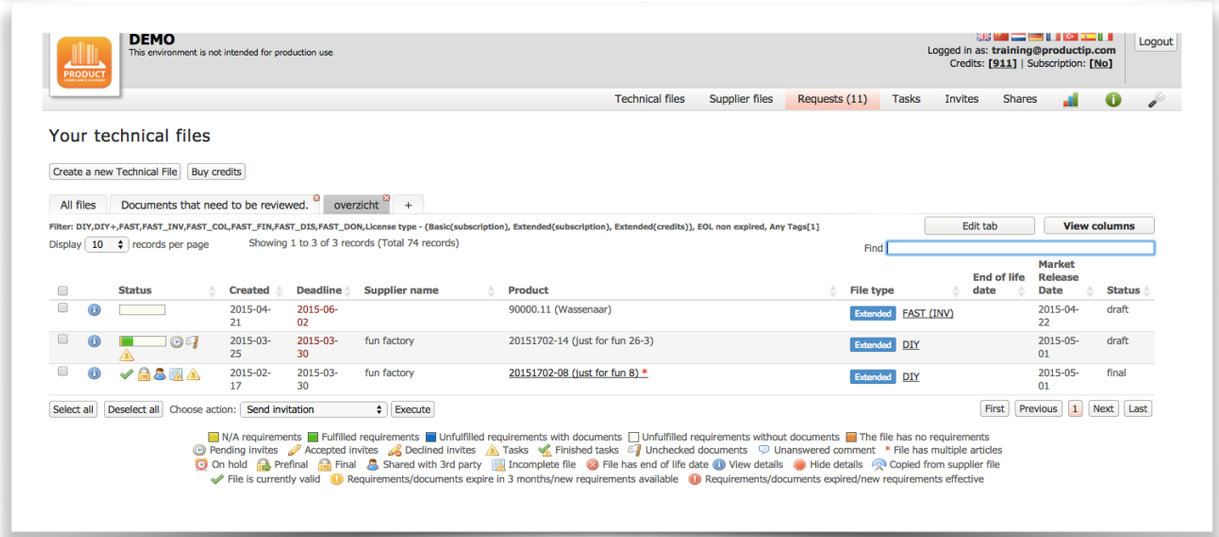
Share:
You decide which documents in the technical file are shared with whom.

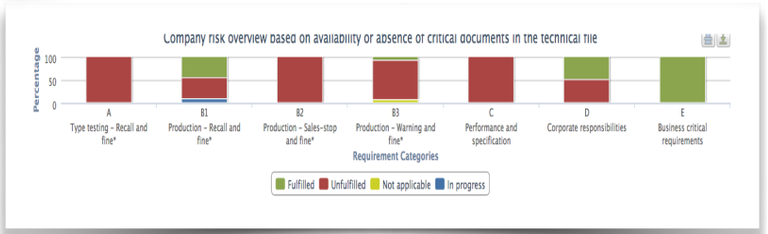
Structure:
Using the platform creates structure.
You always have all the information clearly and logically arranged, directly available.

Insight:
You have access to the completeness of the documents per risk category.





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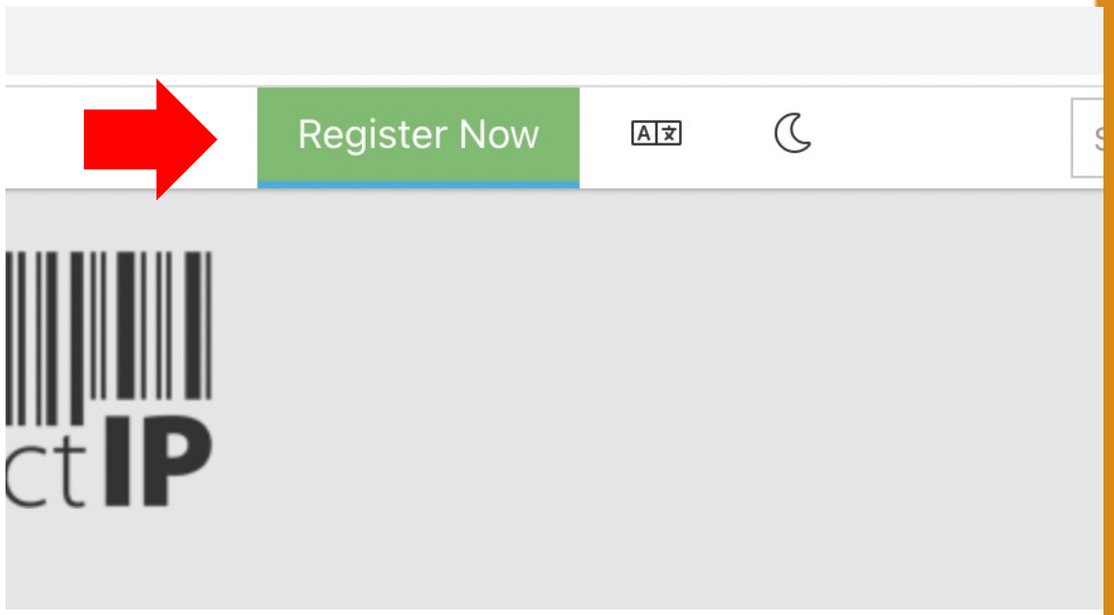
# PRODUCTIP IS NEW TO ME:

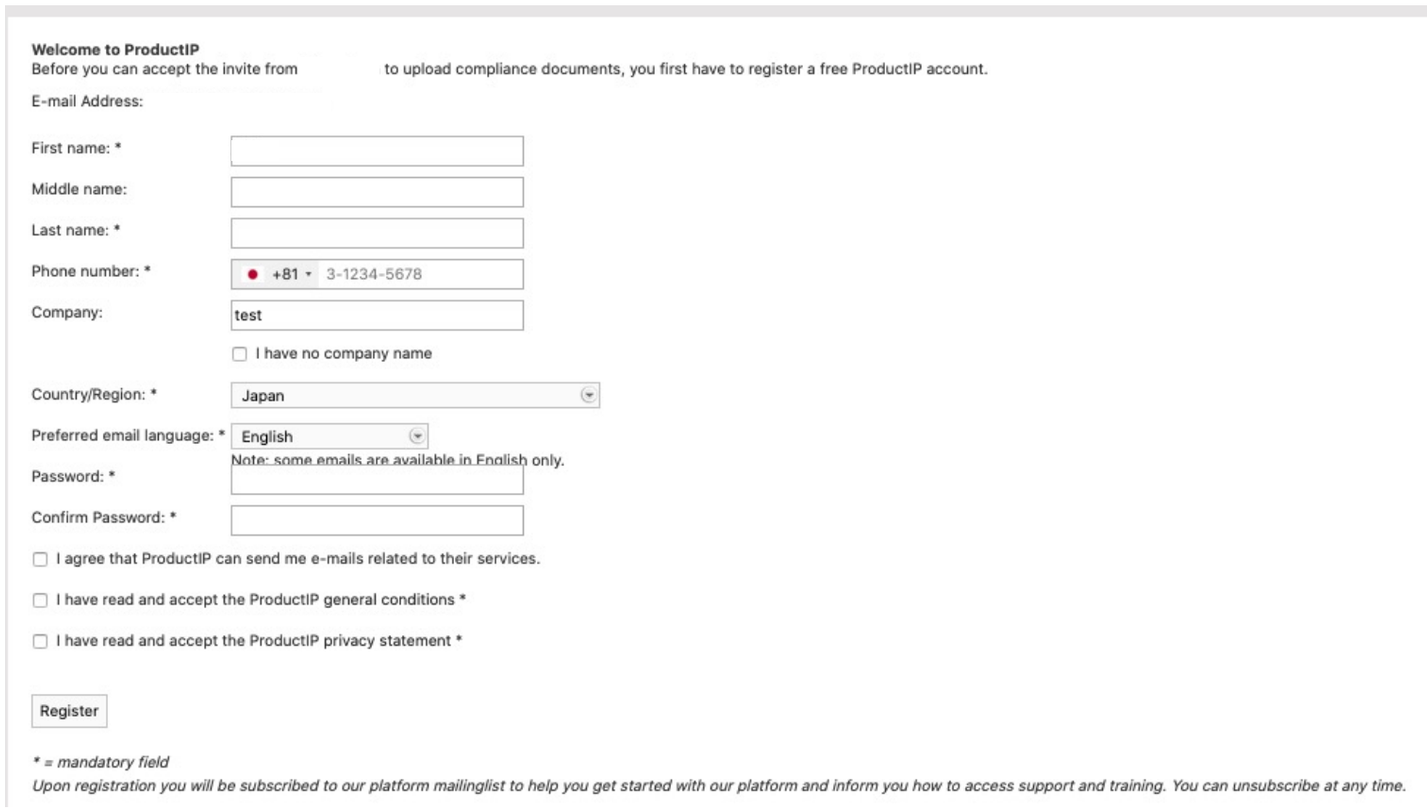
First time user?

Setup your account in a few steps:
fill in your contact details
create your own password and confirm
accept the general conditions
press register
Done!

Your e-mail address is your username!

If you don't receive the email within 5 minutes, please check your SPAM folder.



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4
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# CAN I GROUP ARTICLES TOGETHER IN ONE FILE?

- Same supplier
- Same material
- Same list of Requirements (function)
- Same documents

## Group into 1 file

## Each article has its own file

Start the file with the first article.
Add after creating the file the other articles to the file..

Display 10 records per page

| | Article number | Name | Bar Code | Batch code |
|---|---|---|---|---|
| ⓘ | 20202303 | article | | 87655978654455 |
| ⓘ | 20202304 | article 2 | | 87655978654454 |

# STEP 1 – BUY CREDITS

Within the ProductIP platform you pay for creating a technical file or additional services with credits.*

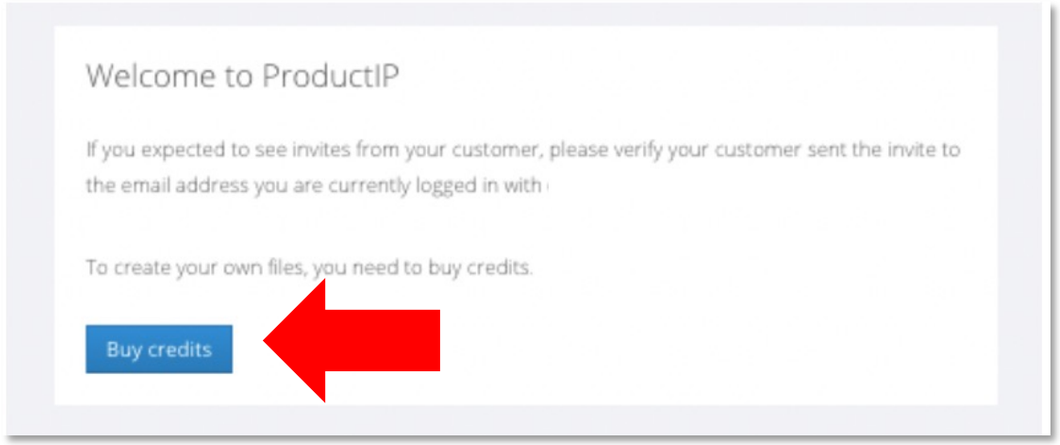
You need at least 2 credits** in order to be able to create a technical file. A file can cover a range of similar articles from one supplier.

Additional services such as File Assembly Support Team, Review, Organise, can also be purchased with credits.

Our pay-as-you-go model allows you to buy credits the moment you need them. You order credits online and these are instantly added to your account. The invoice will be e-mailed to you as PDF for proceeding via your finance department.

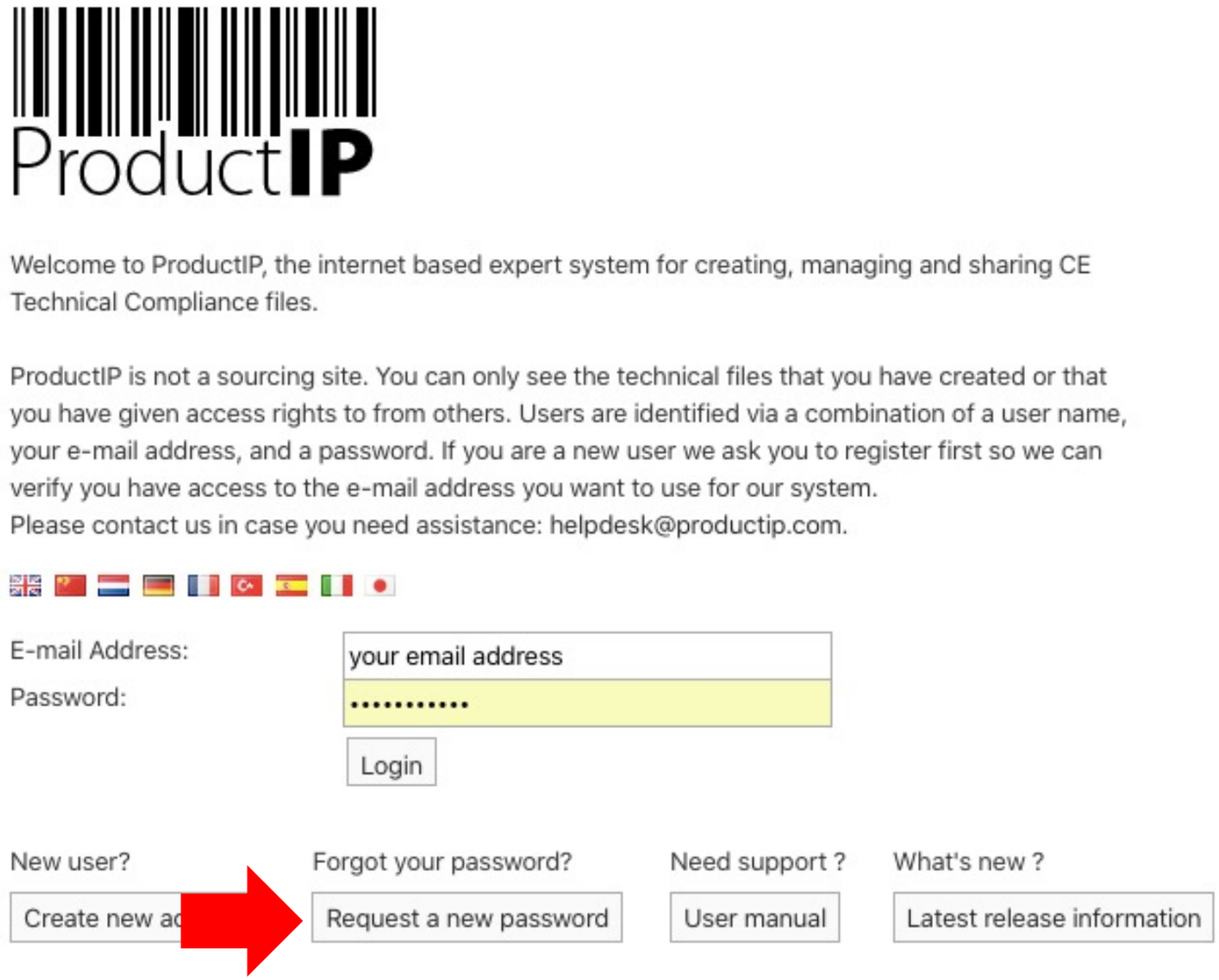
* Enterprise accounts pay per monthly invoice.
** The actual number may change over time.

First time user:



# LOG IN:

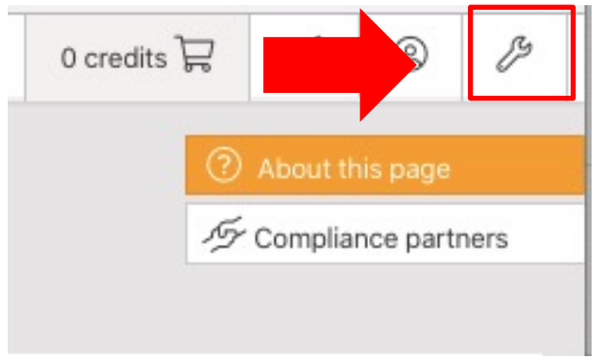
Existing users can directly login in using their e-mail address as username together with the password you have created before.

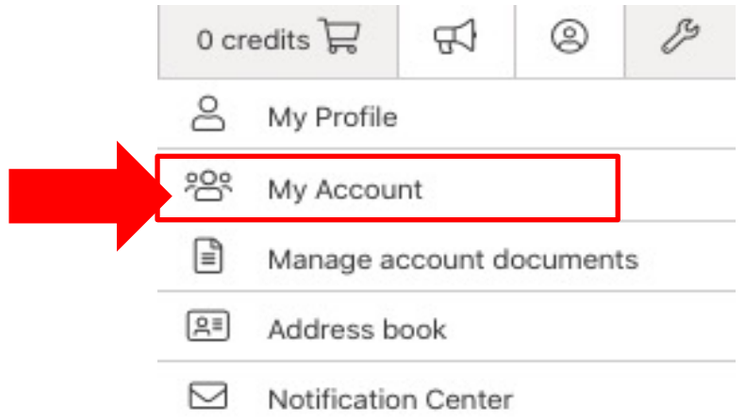



Forgot your password?
Click on the button.
You will receive an e-mail with a link to a webpage.
Here you can set a new password.
If you don't receive the email within 5 minutes, please check your SPAM folder.

# SETUP ACCOUNT SETTINGS:

Add your logo to the account.
This will make your account more personal, and will be used in the email sent to your supplier, on your product information page which you can share with the QR code.



PRODUCT COMPLIANCE ACADEMY
8
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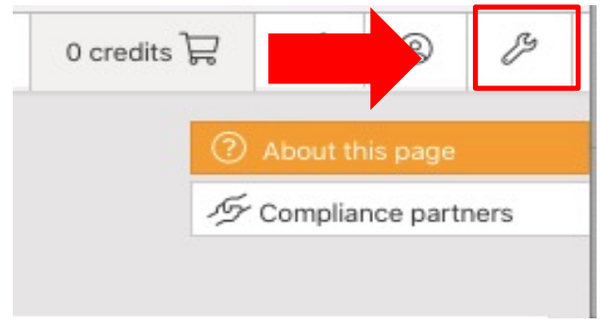
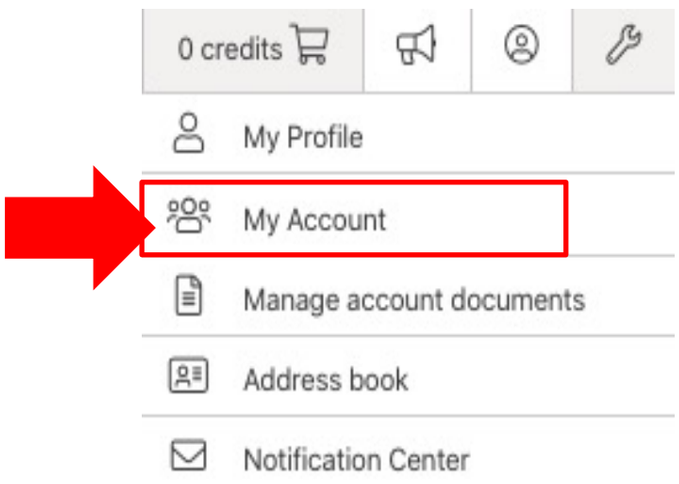
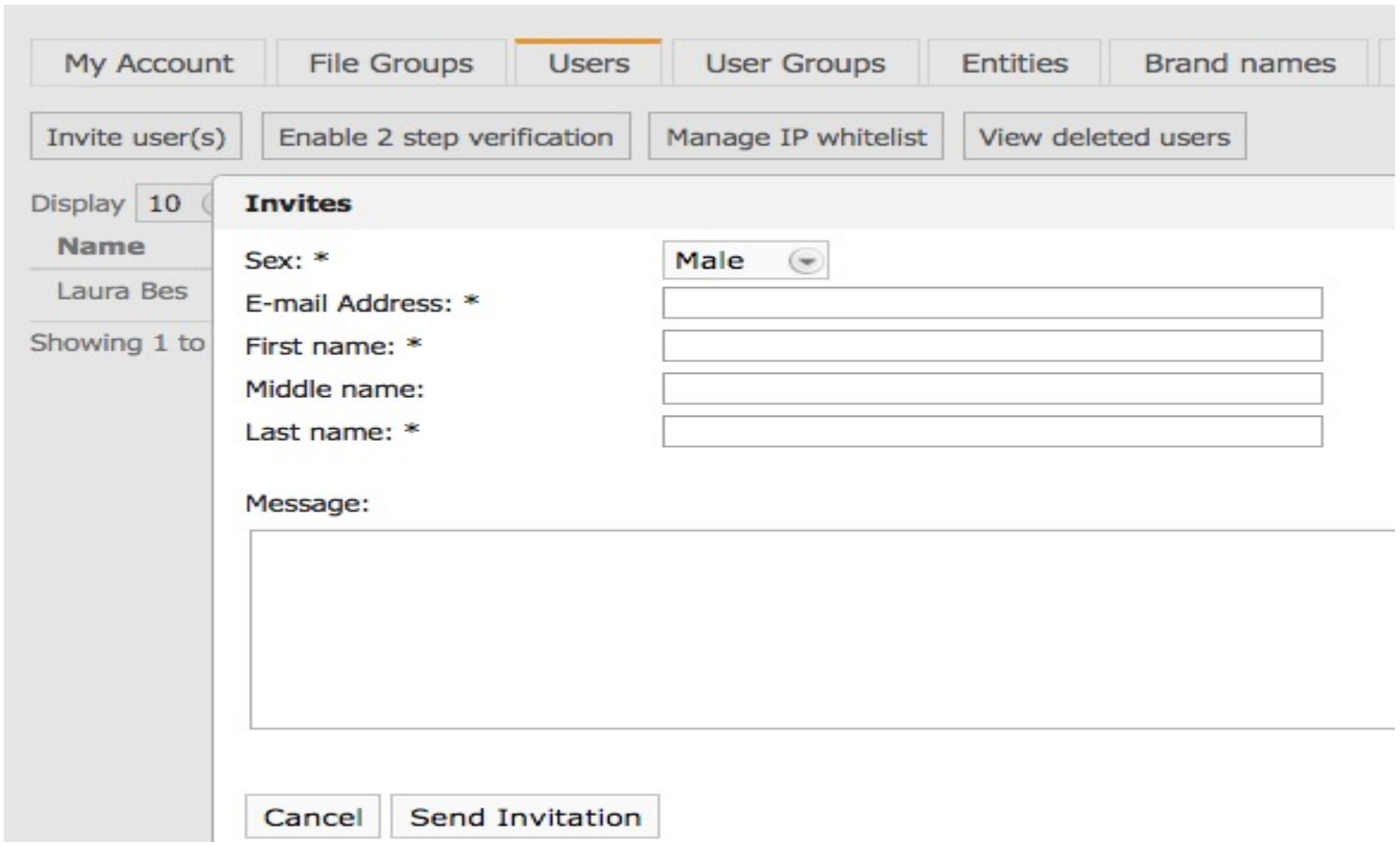
# ADD USERS TO THE ACCOUNT:

In your account you can work together with your colleagues, the admin of the account can add users.
each user must log in with their own login name (=email) and password. The system registers who has done what, and when employees leave, one can easily block the access to the account.

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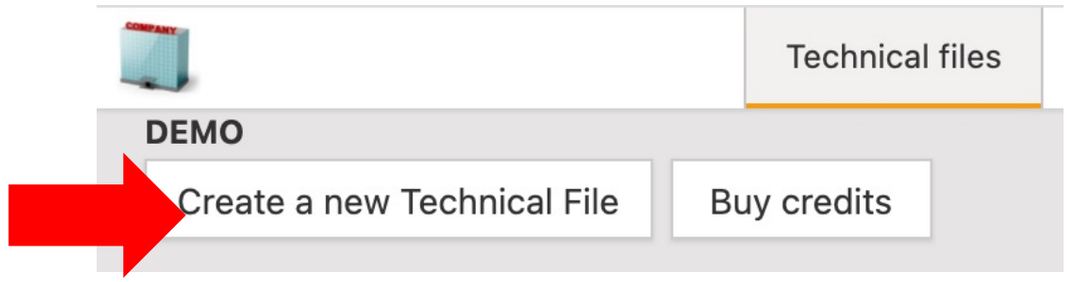
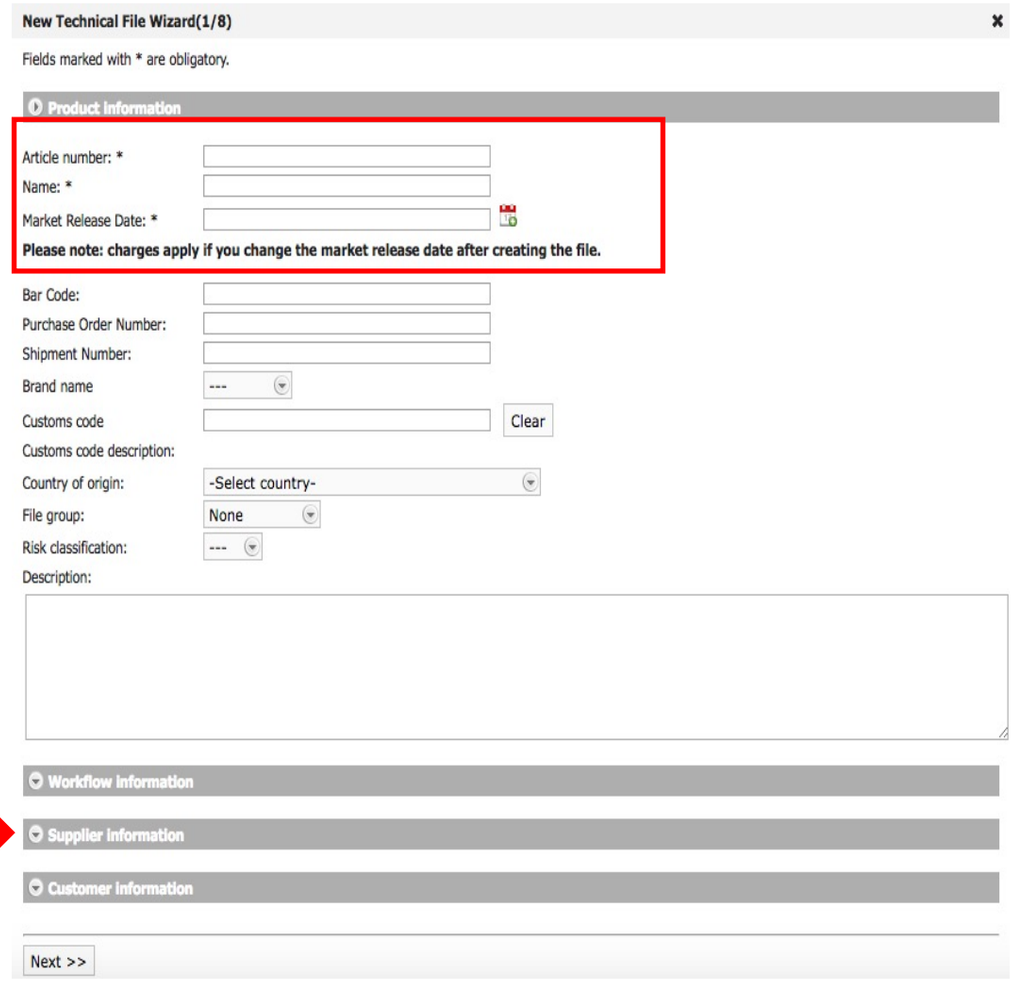
# STEP 2 – CREATE A TECHNICAL FILE

To start your technical file you use the info of the first article, the platform will ask you to provide the following information:

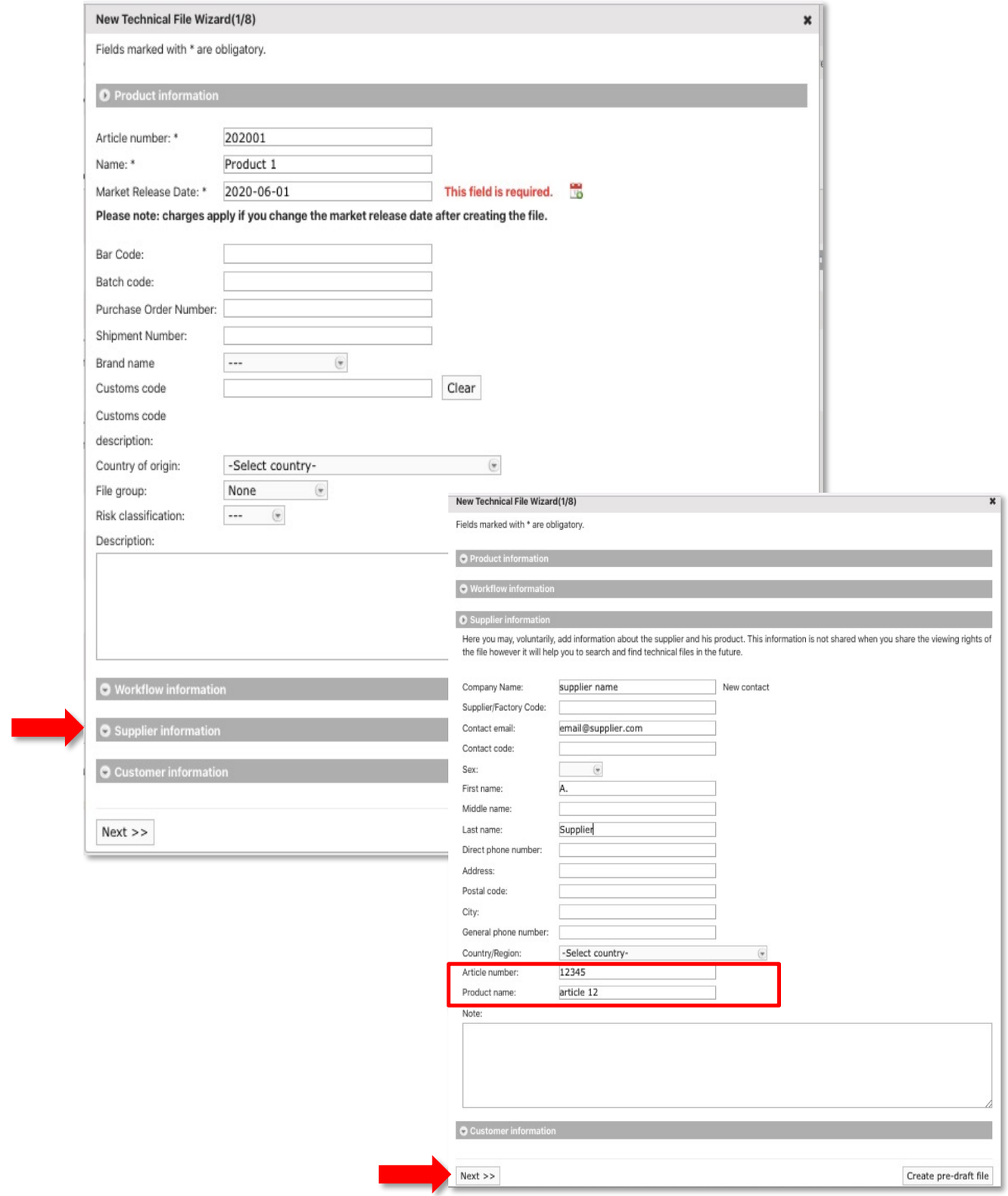
- The article name
- The article number
- When the order of your product enters the European market = the market release date



Supplier contact details*

- data is being registered in the address book
- We will never share this information




You can also add the article number of your supplier to the file, It is also used when the supplier is asked to provide documents. This ensures better recognition of the request.



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# GO THROUGH THE Q & A:

In order to generate the correct requirement list that is the basis for your technical file, the Platform will ask you several extra questions.

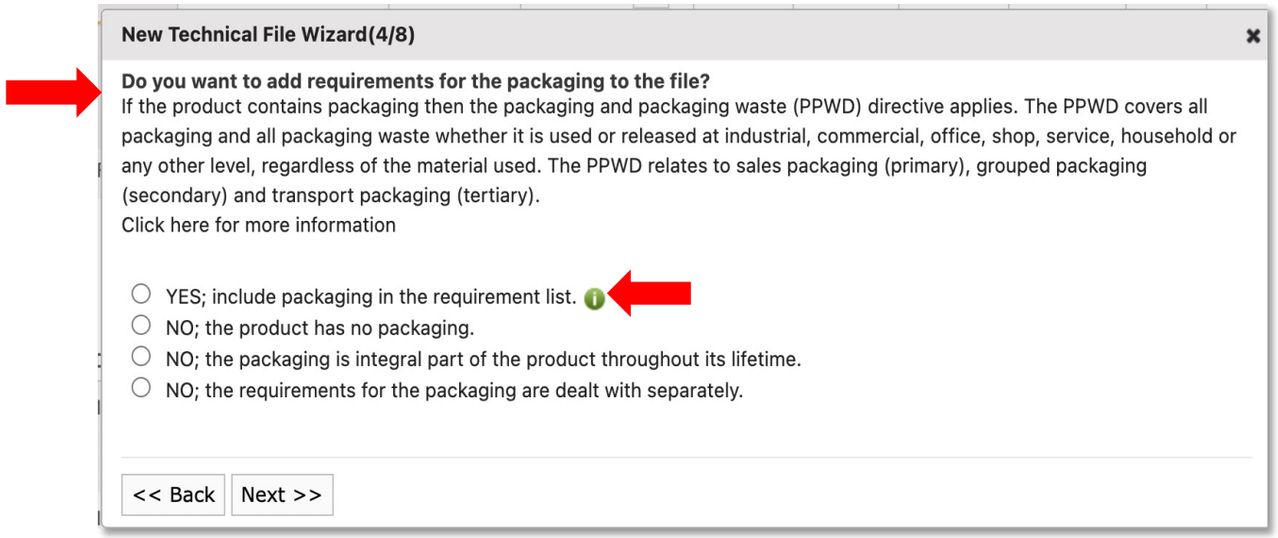
This requires some knowledge of the product. A wrong answer can add or omit a requirement from the list.

- In what countries will you sell?
  => Do not choose all countries, if you only sell it in Germany and France, it can make your list longer with requirements which are not applicable for you.
- Product specific questions
  => So we can add all applicable requirements to your list

Other questions:

- Does the product have packaging
- Do you want to keep track of inspection requirements / results in this the file?
- Do you want to keep track of social compliance aspects of your supply chain partners via this file?

You will find more explanations why this questions is ask, and sometimes more information in a Compliance clip. This is a short “wikipedia like” explanation, about this particulair topic.



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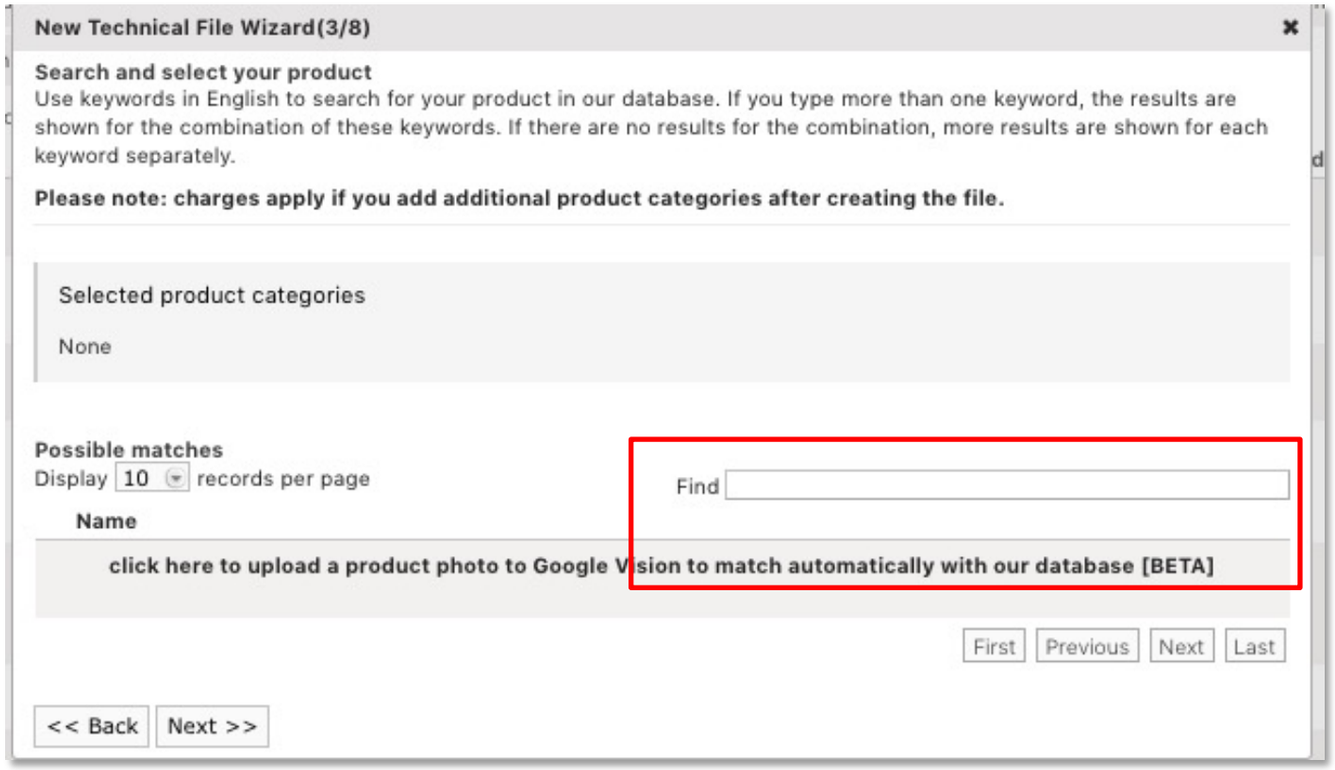
# FIND THE PRODUCT CATEGORIES:




What if my product is not in the database?

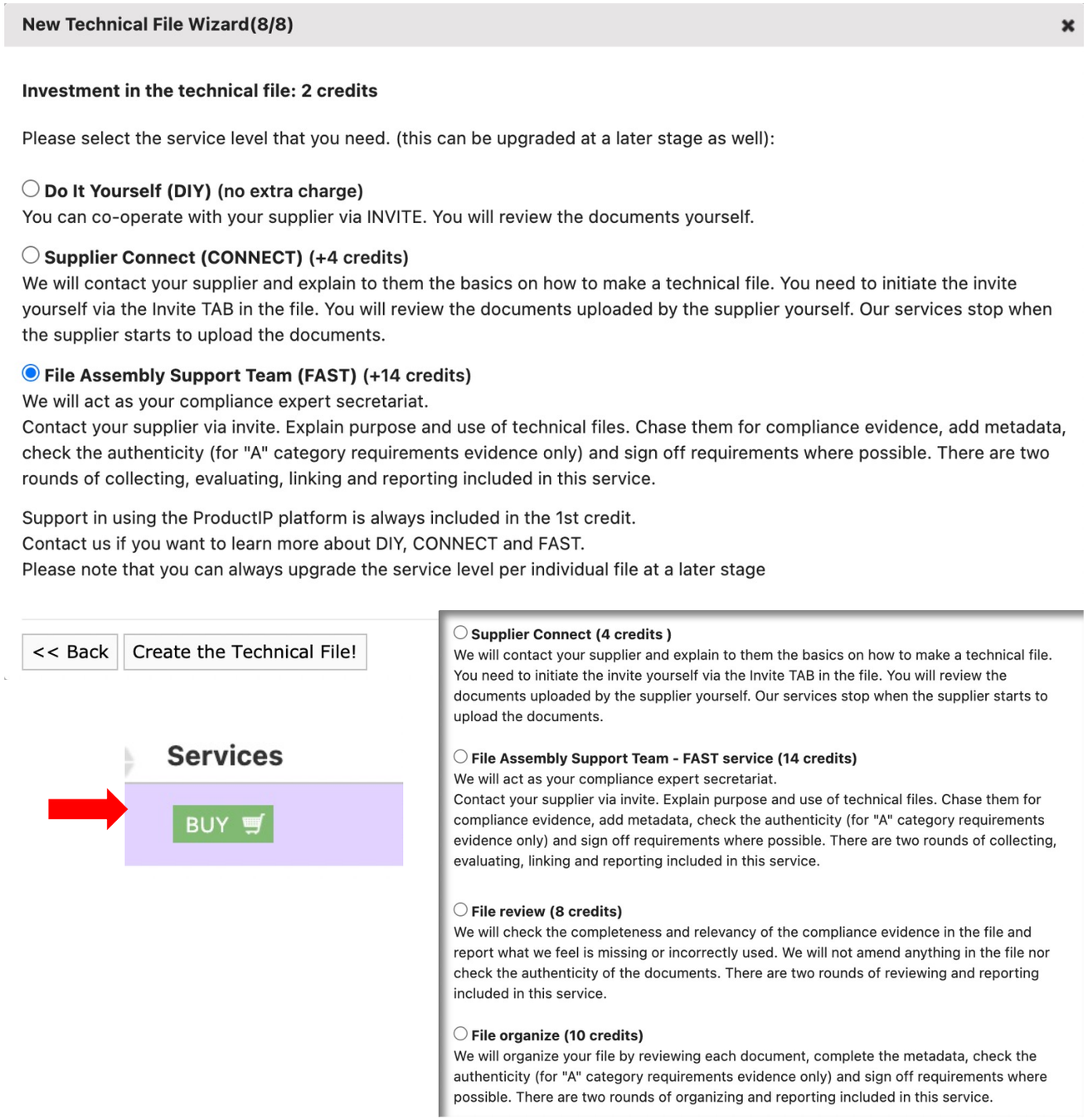
You can then temporarily choose "PROVISIONAL".
After creating the file, add documents for additional information so that we can choose the right category.

ProductIP receives a notification, and we will add the appropriate category. (3-5 work days)
After this you will receive an email and you can get started.

# HOW DO YOU WANT TO CREATE THE FILE?:

There are several ways to create a file.
If you have little experience, we recommend starting the first file in Fast. Here you will find more information and explanations about the different options.
If you have or can collect the necessary documents but lack the expertise to review and link them correctly, then choose DIY, add the documents and then upgrade the file to organize and we will start working for you.

this button allows you to upgrade the file to a different service



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14
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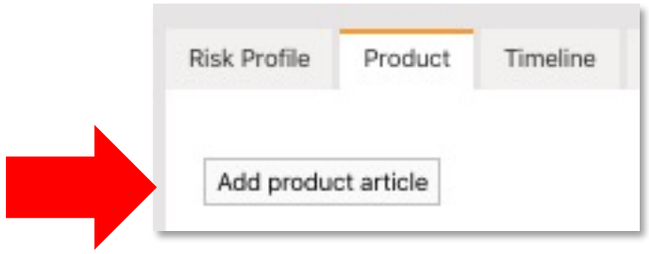
# WHAT TO DO NEXT:

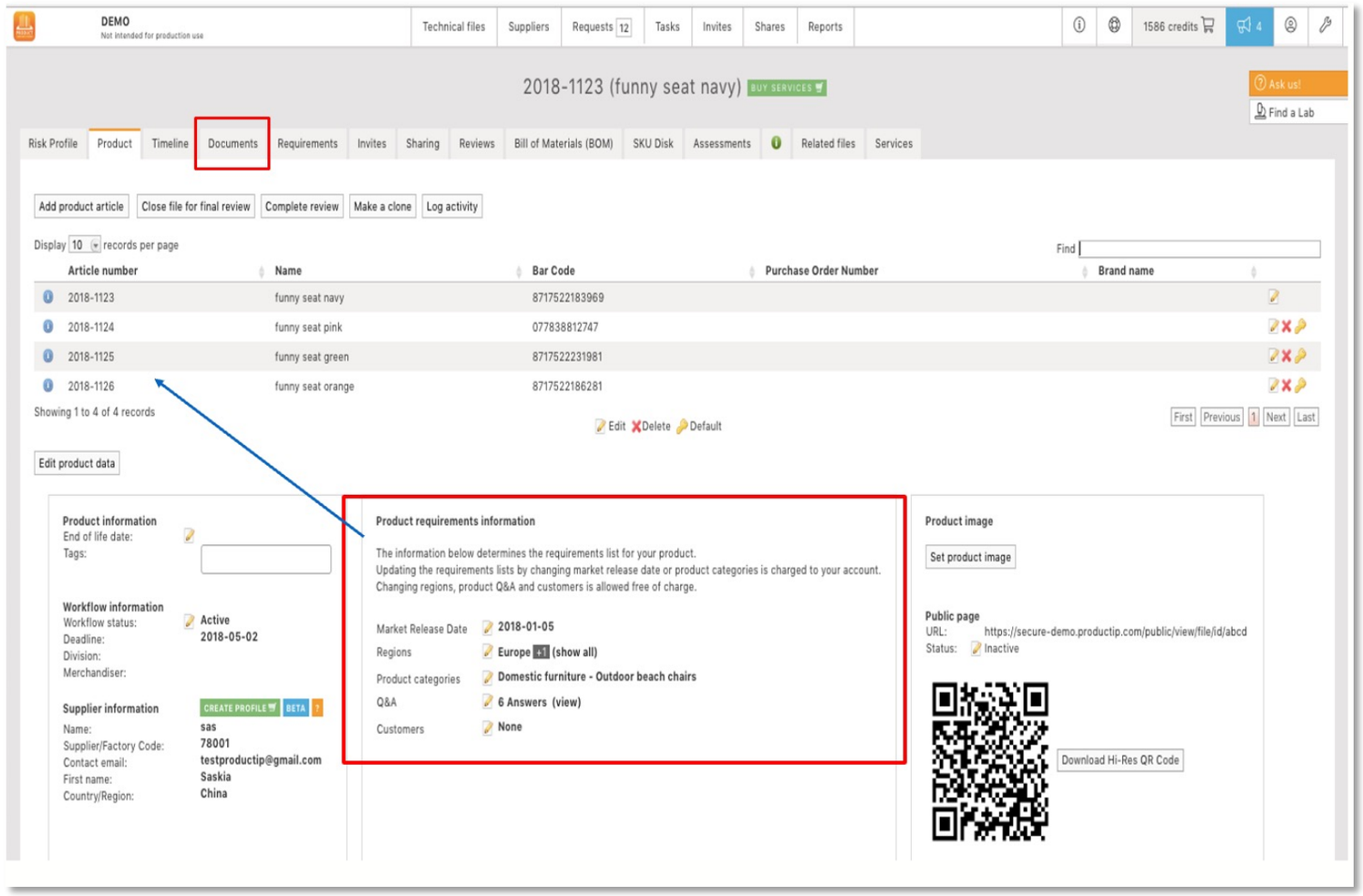
Now you can add the other articles to the file.
These will be displayed on the Product tab.




On the Documents tab, you collect the documents that are relevant to the articles listed on the Product tab.

On the Requirements tab, you find the requirements that apply to the articles.

The requirements list is based on the information indicated in the red frame.



By collecting the right documents and linking them to the relevant requirements, an overview will be created that shows if the product meets the relevant requirements.
You determine the status of the evidence;

Fulfilled Not applicable Unfulfilled In progress

- red there is nothing yet
- green it complies
- blue the linked document is relevant, but not sufficient to declare the requirement fulfilled
- yellow The requirement is not applicable

| Requirements | Category | Expiry Date | Required documents | Services | Regions |
|---|---|---|---|---|---|
| **Product information** (2/6) | | | | | |
| Product construction - Bill of Materials, Substances (BOM, BOS) of the product | B3 | | Bill of Materials (BOM)<br>Bill of Substances (BOS) | | EU |
| 1 Product construction - Drawings, Exploded Views | B3 | | Product Information | | EU |
| Product construction - Printed Circuit Board (PCB) | B3 | | Product Information | | EU |
| 1 Product identification - Declaration of Product Identity | B3 | | Declaration of Product Identity | | EU |
| 1 Product identification - Pictures, artwork | B3 | | Product Information | | EU |
| 1 User information - Manuals and Instructions | B3 | | User manual | | EU |
| **Product Labelling** (1/4) | | | | | |
| CE marking | B1 | | Product Labelling - Artwork | | EU |
| EN 50419:2006 - WEEE symbol | B2 | | Product Labelling - Artwork | | EU |



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# CATEGORIES OF THE REQUIREMENTS:

## PRODUCTIP CATEGORIES

DOC - Declaration of Conformity
RISKS - Risk assessments
A - Type testing – Recall and fine
B1 - Production – Recall and fine
B2 – Production – Sales-stop and fine
B3 – Production – Warning and fine

TECHNICAL FILE

T – Transport
C – Performance and specification
D – Corporate Responsibilities
E – Business critical requirements
F – Company specific requirements
G – Guides, Decisions, Recommendations and Test methods

BUSINESS RISKS





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# COMPLIANCE CLIP

## REQUIREMENT CATEGORIES

530

Make your life easier and the structure of your files more clearly with the requirement categories in ProductIP.

When you first start to make technical files the list of requirements can be overwhelming. We have added categories that help you breakdown the requirement list in different risk levels. This means you know where to start first and focus.

The combination of requirement categories A and B creates the minimum for a technical file as expected by the market surveillance authorities. So here you have your first focus: A + B1 + B2.

**Category A**

**Type testing**

Standards and requirements that are related to the intrinsic design of the product. In most retail organisations it is the responsibility of the purchasing department to ensure that this information, together with specifications and so on, have been made available to the supplier. The supplier in return has to provide the evidence: a test report, declaration or similar. The majority of the requirements is in this category, it includes the harmonised standards that typically are applied to show compliance with the essential requirements of directives, such as: Toys, LVD, EMC, R&TTE, PPE and more.

**Category B**

**Production**

Where category A requirements relate to the construction and design, B requirements relate to the actual production of the product. Has the product been made as it was originally tested? It is important to check if materials that are used during manufacturing of the product are not in conflict with legislation (REACh, RoHS, Food Contact Materials, etc.).

We differentiated the category B in three subcategories (B1, B2 and B3) dependent on the penalties that market surveillance authorities may proclaim.

**Category C**

**Performance and specification**

These are requirements that are used to prove performance or functional aspect of a product. The owner of such claims is in most organisations the marketing and communication department. Examples are colour fastness of textiles and durability of products.
Non-compliance may lead to complaints and dissatisfied users of the products.

**Category D**

**Corporate responsibilities**

This category covers all kind of requirements related to Corporate (Social) Responsibility. The owner of these requirements is the board of directors of the company. Examples are BSCI, FSC and waste recycling requirements.
Non-compliance may lead to critical questions from consumers and especially NGO's have agenda's related to these topics.

**Category E**

**Business critical requirements**

Non-compliance with these requirements means that the risk of not being able to sell this product is very high, not from a legal but from a business point of view. For example licenses or default sizes of kitchen furniture or other aspects of products have become "the standard" in the market.

**Category F**

**Company specific requirements**

This includes requirements defined by buying companies in addition to the legal requirements. Non-compliance may lead to a situation where your customer is not accepting the goods. (Note that it is also possible for you to distribute in an orderly manner your set of requirements to the market via ProductIP).

**Category G**

**Guides and Test methods**

Requirements that contain guidelines on design (e.g. products with hot surfaces or hygiene for food processors) or describe test methods (e.g. standby current for appliances or chromium content in leathers). These requirements do not contain limits, but they could be referred to in test reports.

**Category T**

**Transport**

Requirements that are applicable to the transport of products, such as fumigation of wood, or the safety tests for transport of lithium batteries are shown here.

**Category DOC**

**Declaration of Conformity**

An overview of the CE marking directives that are applicable for the product that must be mentioned on the Declaration of Conformity are listed here.

*Disclaimer: This document provides guidance and is not a legally binding interpretation and should therefore not be relied upon as legal advice. This document can be updated at any time without prior notice.*

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18

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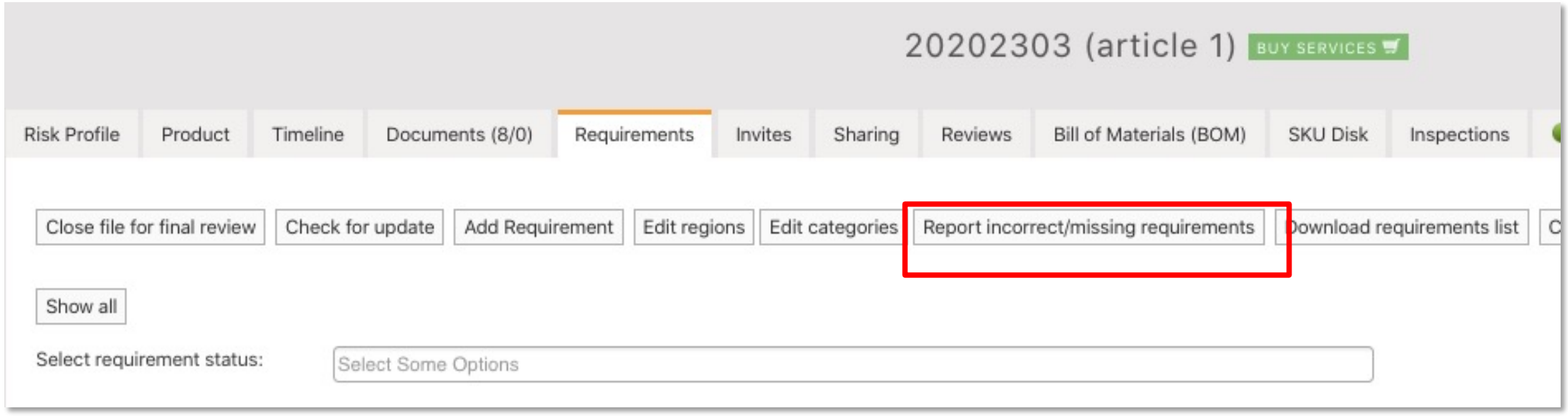
If you come across standards on the requirement list that you find strange, or you receive a test report that mentions other standards, please check the chosen category.
If you still want to ask a question about this, do so via the button "report incorrect requirements".
ProductIP will then receive an email with the context of the file.



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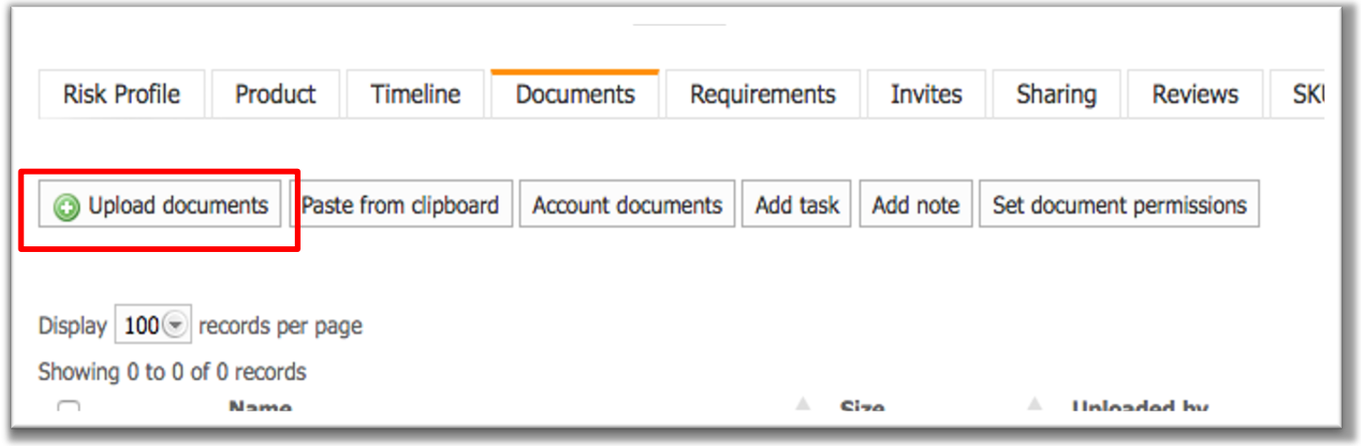
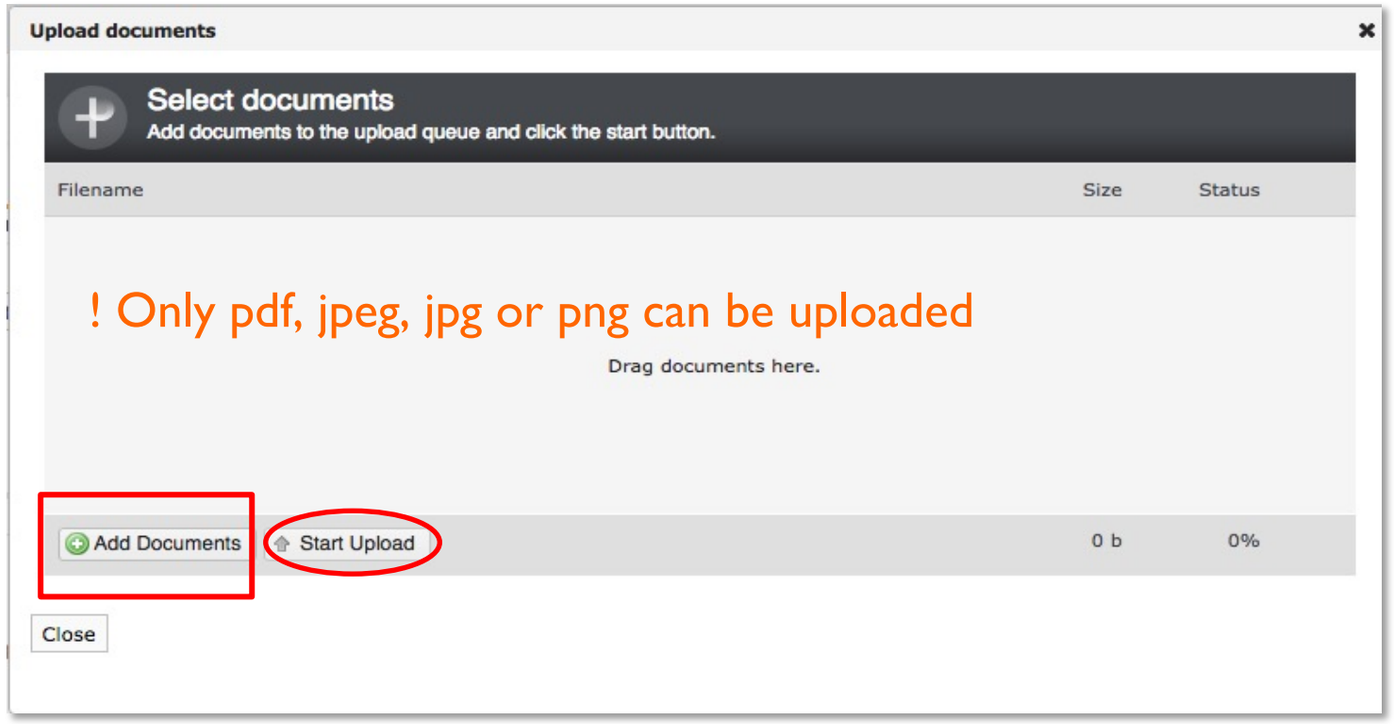
# STEP 3 - UPLOAD DOCUMENTS:

Within the file you need to start collecting documents that allow you to demonstrate that the product complies.

Upload the documents that you already have to match the different requirements on the list.



# HIDE INFORMATION:

## Redaction tool

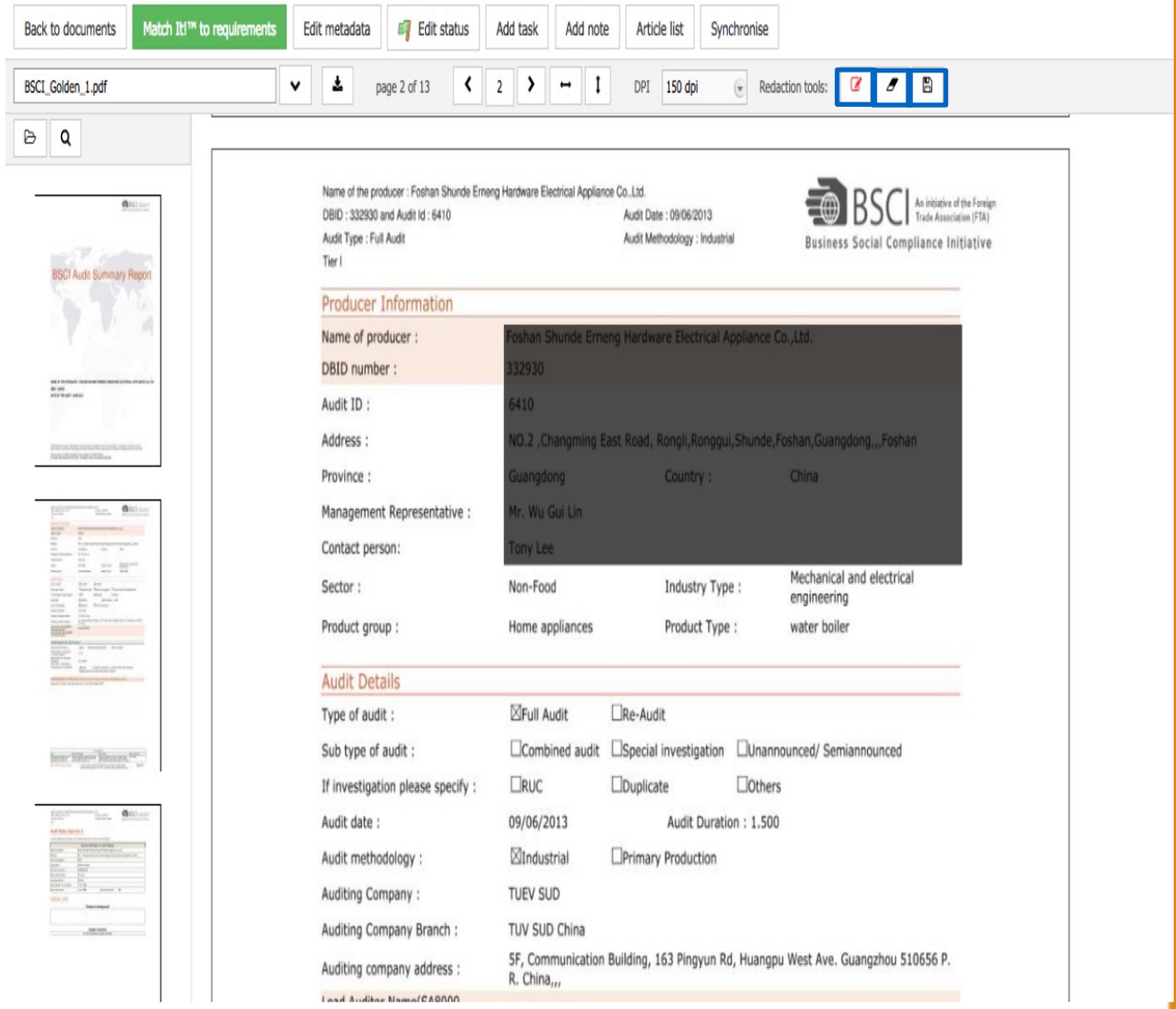
Sharing a technical file with your business partner is a common thing. They may need it because they are the brand owner and have the responsibility for compliance. They may also want to see it as part of a review of your efforts as an importer.

Sharing a technical file through ProductIP keeps the information in context and makes the review more efficient. You make available the scope of the dossier, the correct market introduction date, the countries selected, and all of this adds to the confidence they have in your concern for product and social compliance.

We automatically hide information about your supplier when you share a file, but this cannot be done automatically for what is in your documents! We now have a solution for that!

With the editorial tool in the viewer, you can remove such information and create a document that you can share. We immediately add a watermark to that document so that the recipient knows that you have the document that is the basis for this edited document available in case it is needed

How does this work?



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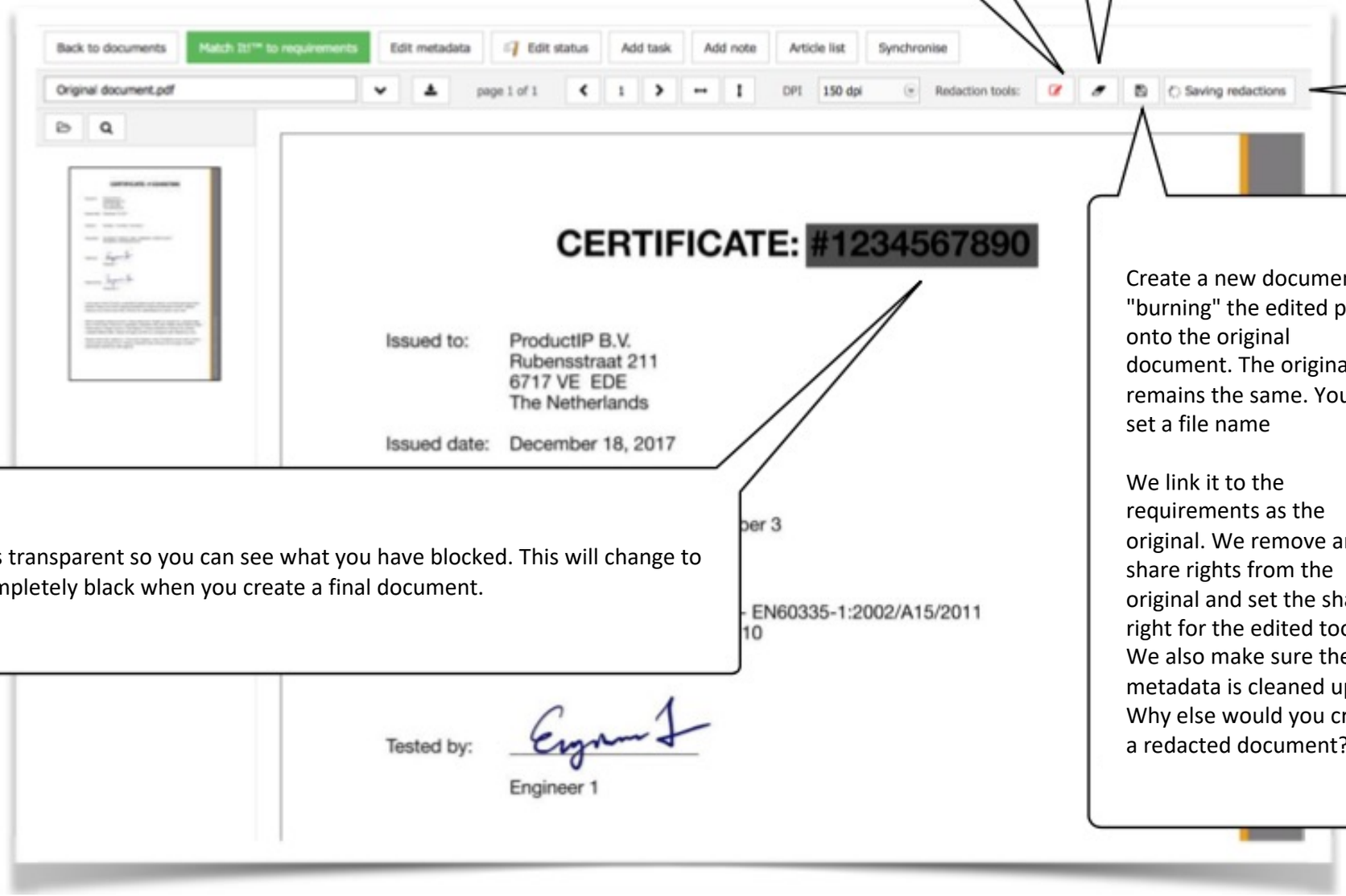
Add a rectangular area to cover what needs to be removed

Delete the area if you made a mistake




It is transparent so you can see what you have blocked. This will change to completely black when you create a final document.

Create a new document by "burning" the edited parts onto the original document. The original remains the same. You can set a file name

We link it to the requirements as the original. We remove any share rights from the original and set the share right for the edited tool. We also make sure the metadata is cleaned up! Why else would you create a redacted document?

We automatically save your editing area when you are editing. You can close the browsers and continue working the next time you open the original document.

Only when you "burn" a final document will we make a copy with permanent and all-black redaction areas

At that point, the original document will no longer have an editing layer to continue editing. If you want to add more, you must continue on the "burned" edited document

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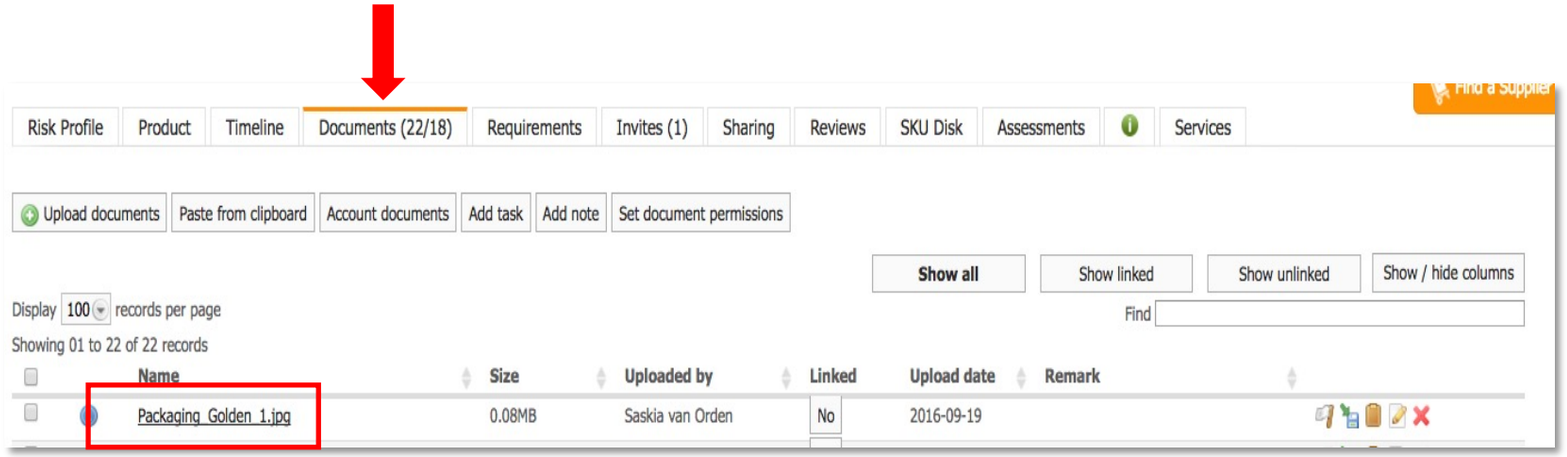
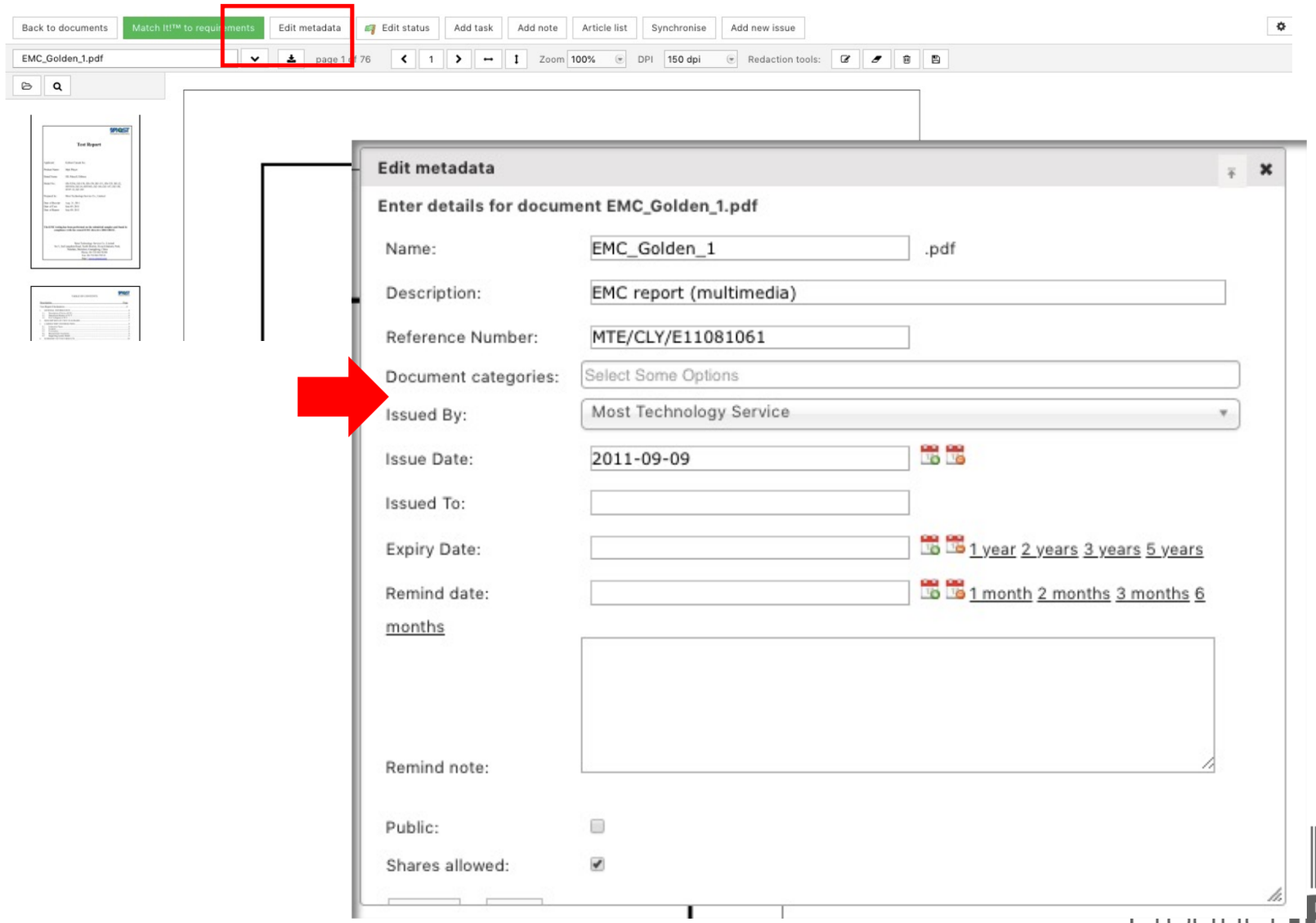
# LINK THE DOCUMENTS:

Go to the Documents tab, open the document by clicking on the name




Click on Edit metadata;

- You can change the name
- We advise to add the Document categories






PRODUCT COMPLIANCE ACADEMY
23
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# REVIEW THE DOCUMENTS:

Review the received documents

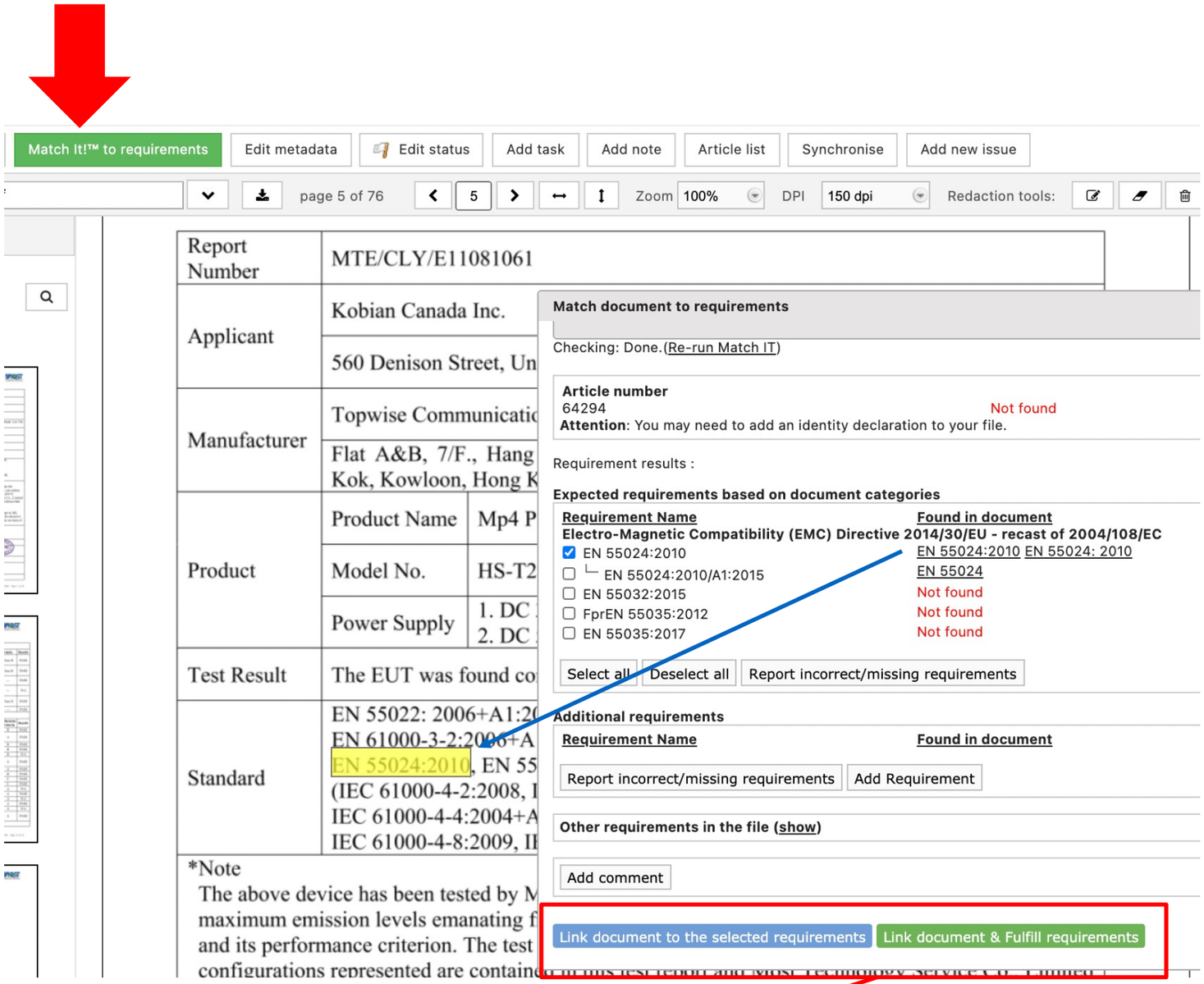
At the moment you receive documents (test reports), the specified standards are the tools to check if you have received the correct evidence.
You need to read and check the test report:
Is this about my product (check the picture)?
Who performed the test
When was the test performed
What is the result
When the documents meet the necessary requirements, Match-it can be used to link the document to the requirements, so that you have an overview of whether you have the complete documentation. In case of a transition period, you can either tick off the requirements or declare them not applicable.

Check also our other events:
https://www.productip.com/event-calendar/calendar-view

# LINK DOCUMENTS:

With MatchIt you can link the documents to the Requirements.
Please note, this is a suggestion, so please tick the appropriate requirements.
You still need to read the document, and verify that the document is relevant and that the documents are compliant.

After checking the requirements, you can choose the blue button, document is relevant, but not yet sufficient.
Select the green button if the requirement is fulfilled.




On the requirementlist:

PRODUCT COMPLIANCE ACADEMY
25
A WORLD IN WHICH PRODUCTS CAN BE TRUSTED
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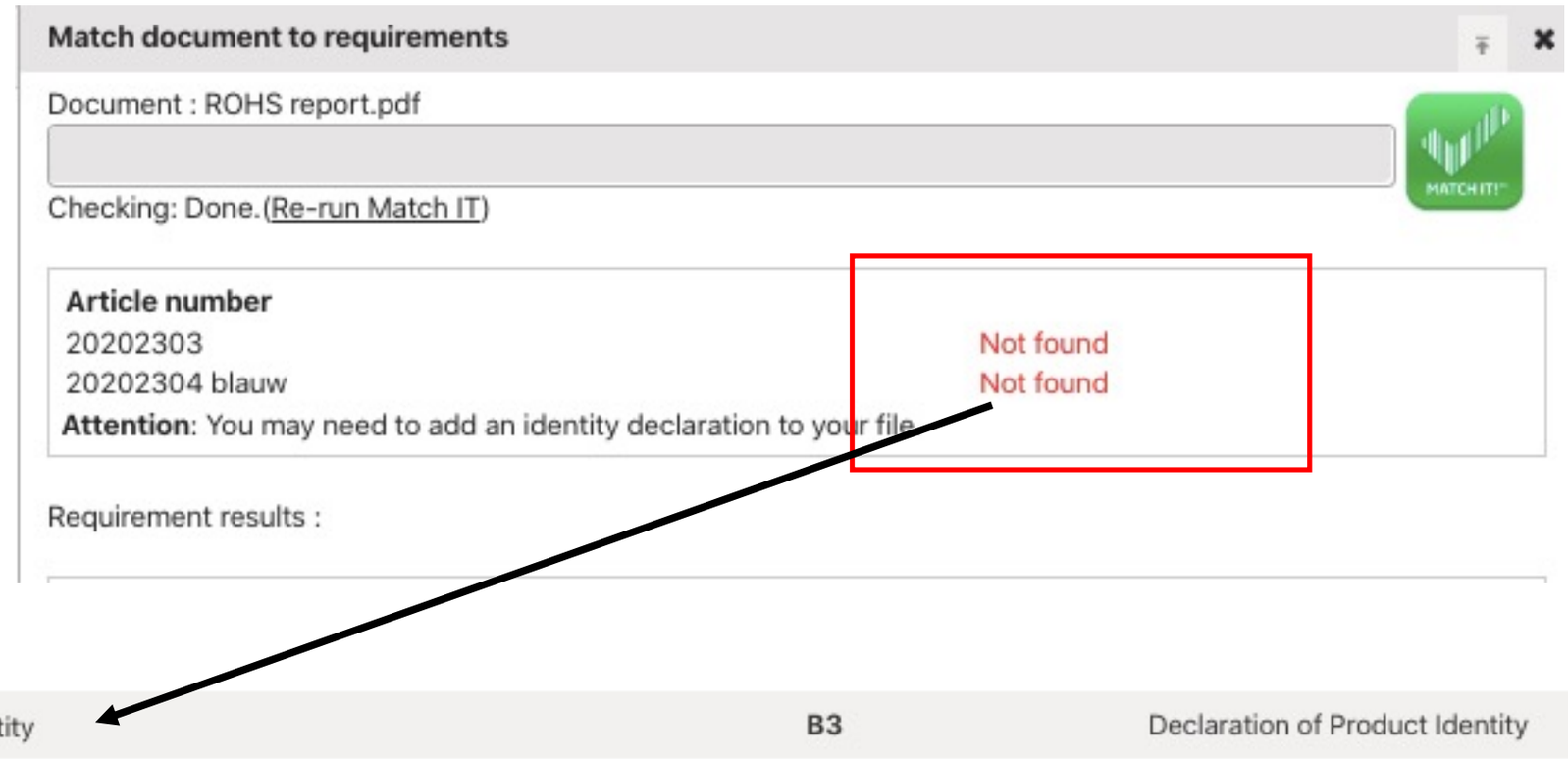
MatchIt only reads the document and gives this message if the article number is not in the document.
Regardless of whether there is already a Dopi.
So that one is always alerted if the document is relevant.



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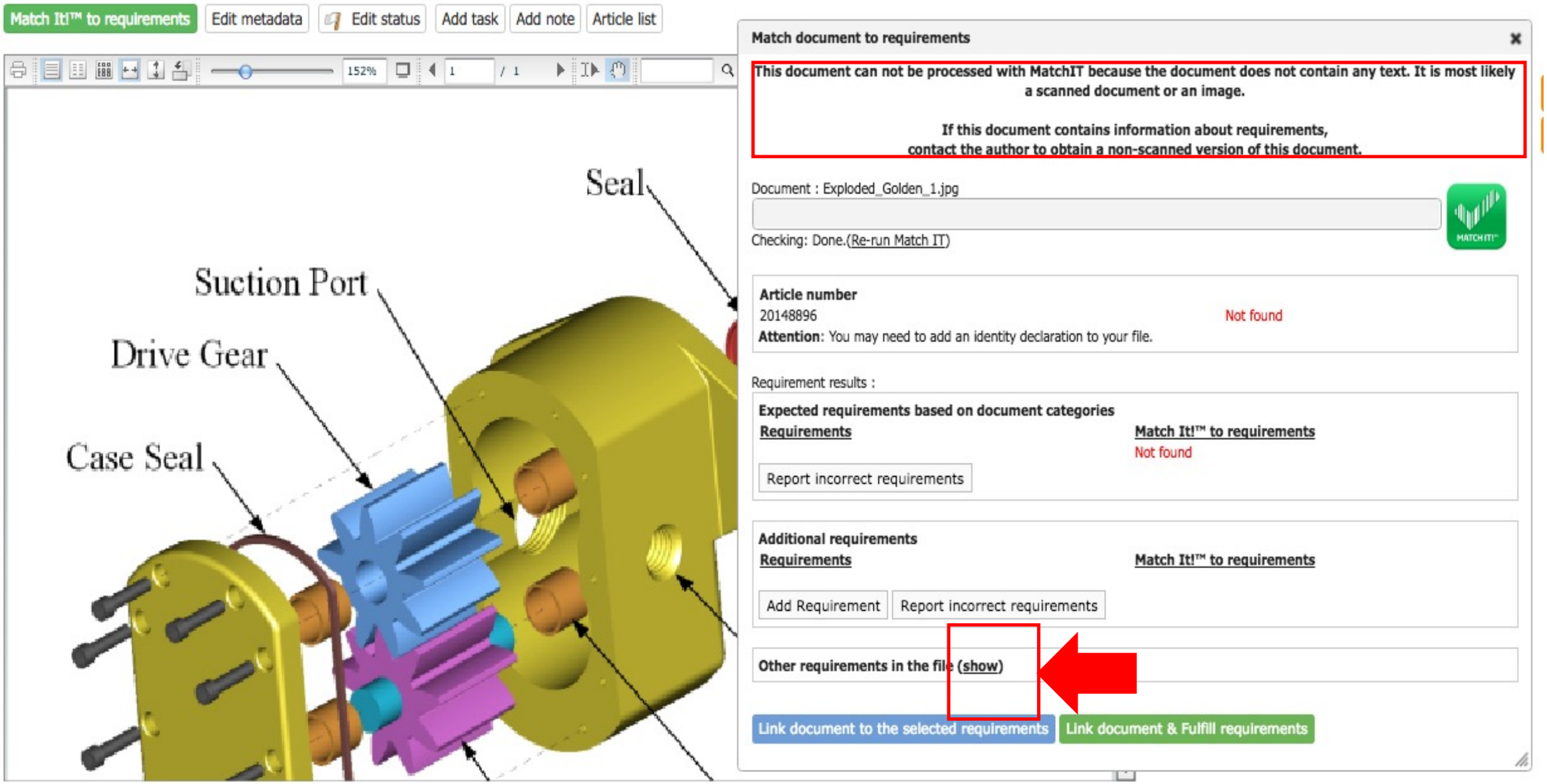
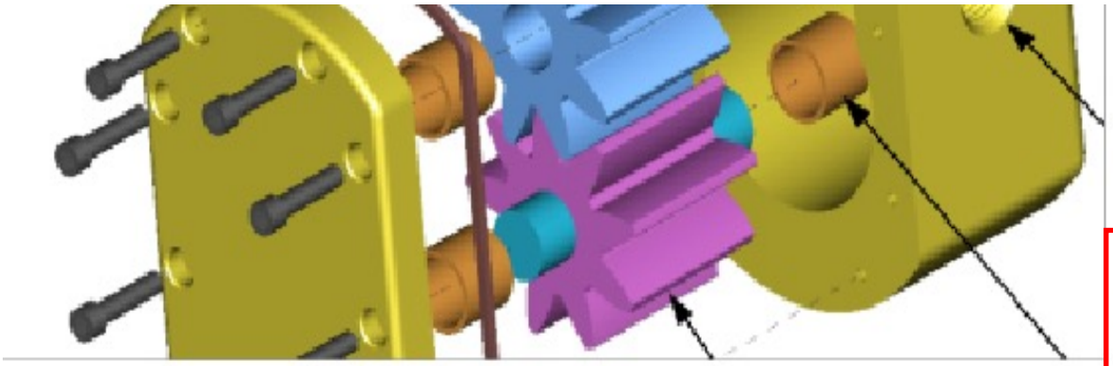
# What if Match-It! can't find a suggestion?

Click on show, (go to the next page)



The entire list of requirements is shown and you must make a selection of where the document can be linked to.



Powered by P

Add Requirement | Report incorrect requirements

**Other requirements in the file (hide)**

**Requirements**

**Product Information**

- [ ] Product construction - Bill of Materials, Substances (BOM, BOS) of the product
- [x] Product construction - Drawings, Exploded Views
- [ ] Product construction - Printed Circuit Board (PCB)
- [ ] Product construction - Safety Critical Components List (CCL), Constructional Data (CDF)
- [ ] Product identification - Declaration of Product Identity
- [ ] Product identification - Declaration of Product Identity of packaging
- [ ] Product identification - Picture, artwork of Packaging
- [ ] Product identification - Pictures, artwork
- [ ] Traceability - Production Batch code
- [ ] User information - Manuals and Instructions
- [ ] User information - Markings, Ratings, Warnings, Pictograms

Link document to the selected requirements | Link document & Fulfill requirements



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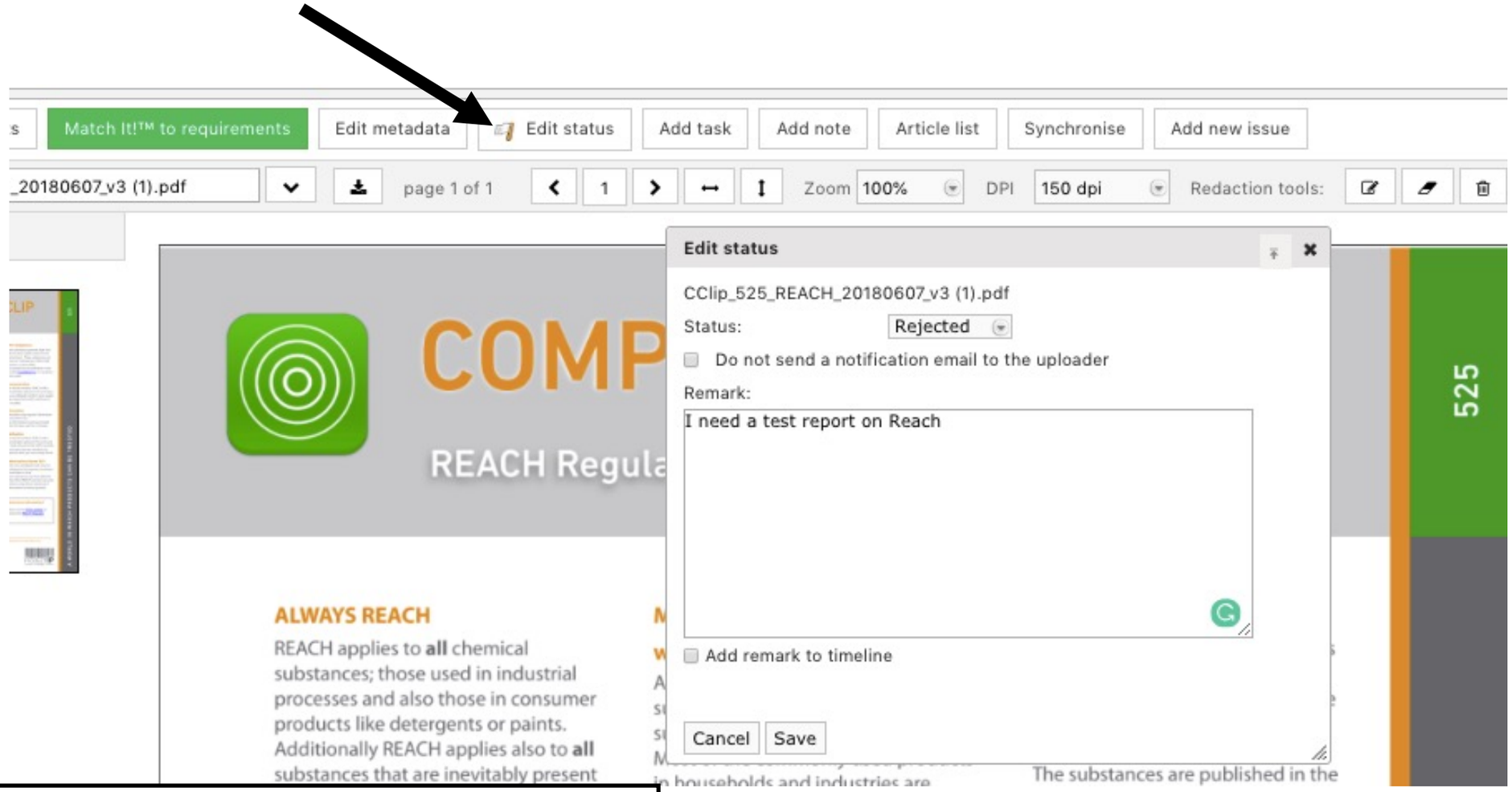
When you reject a document, the supplier will get an email




Dear Saskia van Orden,

The document "Template_DoC_French EnvironmentalCode_EN[1].PDF" has been declined".
Product: just for fun (20151702-0 clone van basis)

Kind regards,

user ProcuctIP
Productip training



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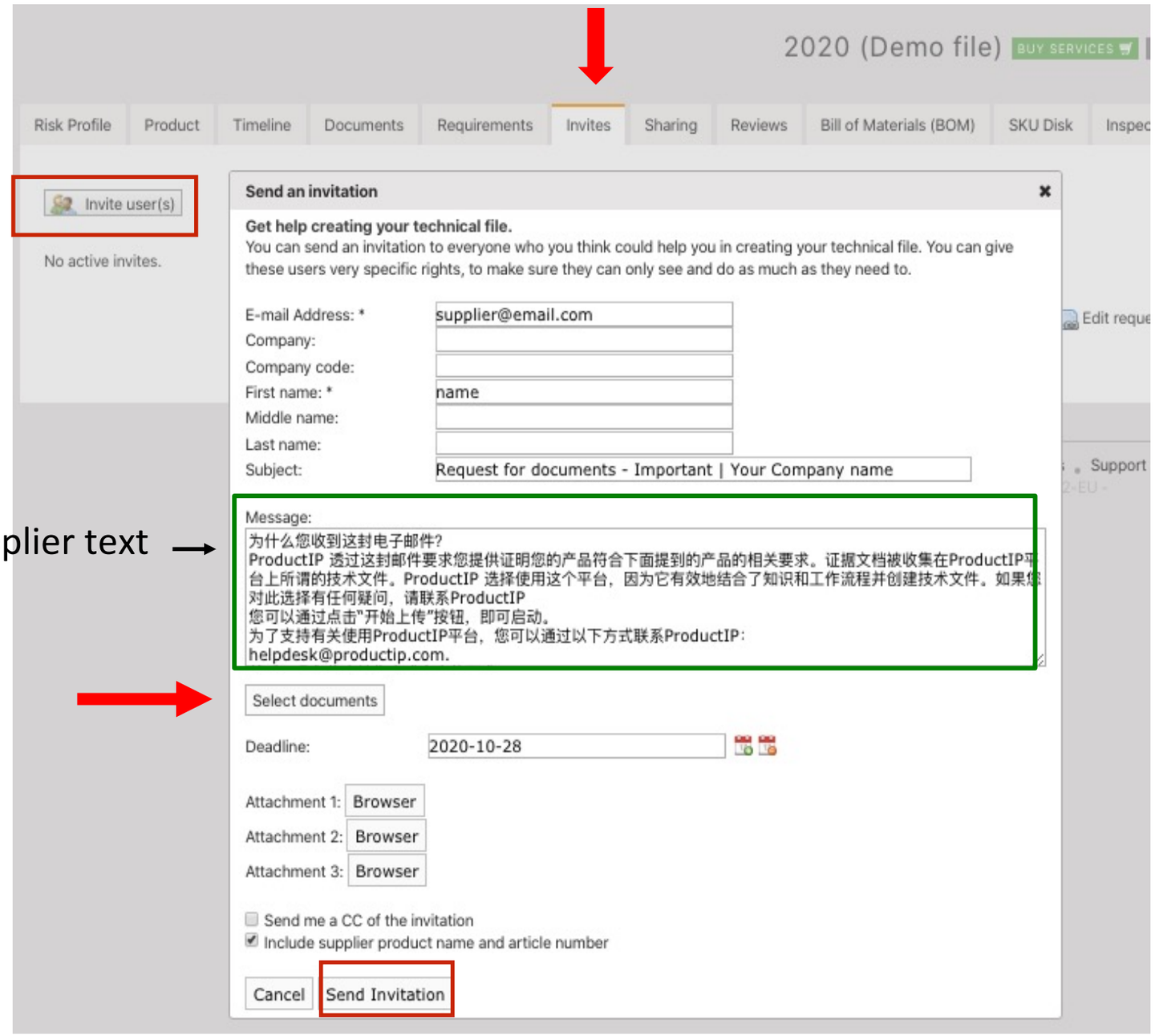
# STEP 4: ASK YOUR SUPPLIER FOR EVIDENCE:

Via an Invite you connect a supplier to a file, not to your account. Your supplier can upload the documents directly into the file.

Your supplier will get an email. He has to register There is no charge for that.

Your message to the supplier text →

You can select which documents you want to receive from the supplier. If you do not make a selection, all documents will be requested from those requirements that have not been fulfilled or declared not applicable.



# REVIEW AND LINK THE DOCUMENTS:

At the moment you receive documents (test reports), the specified standards mentioned on the requirementlist are your guide to check if you have received the correct evidence.

You need to read and check the test report:
- Is this about my product (check the picture)?
- Who performed the test
- When was the test performed
- What is the result

When the documents meet the necessary requirements, Match-it can be used to link the document to the requirements, so that you have an overview of whether you have the complete documentation. In case of a transition period, you can either tick off the requirements or declare them not applicable.

**How to link the documents go to page 21**

# MORE EXPLANATION ON THE REQUIREMENT LIST:

## Standard numbers

- A means Amendment
- AC or C is a minor text correction / corrigendum. Sometimes not mentioned on a certificate
- /A1:2000 A2:2002 etc would be a logic order and the year published
- Double digit like A11 means the amendment is only for EUROPE!



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# SOMETIMES YOU MAY CHOOSE.

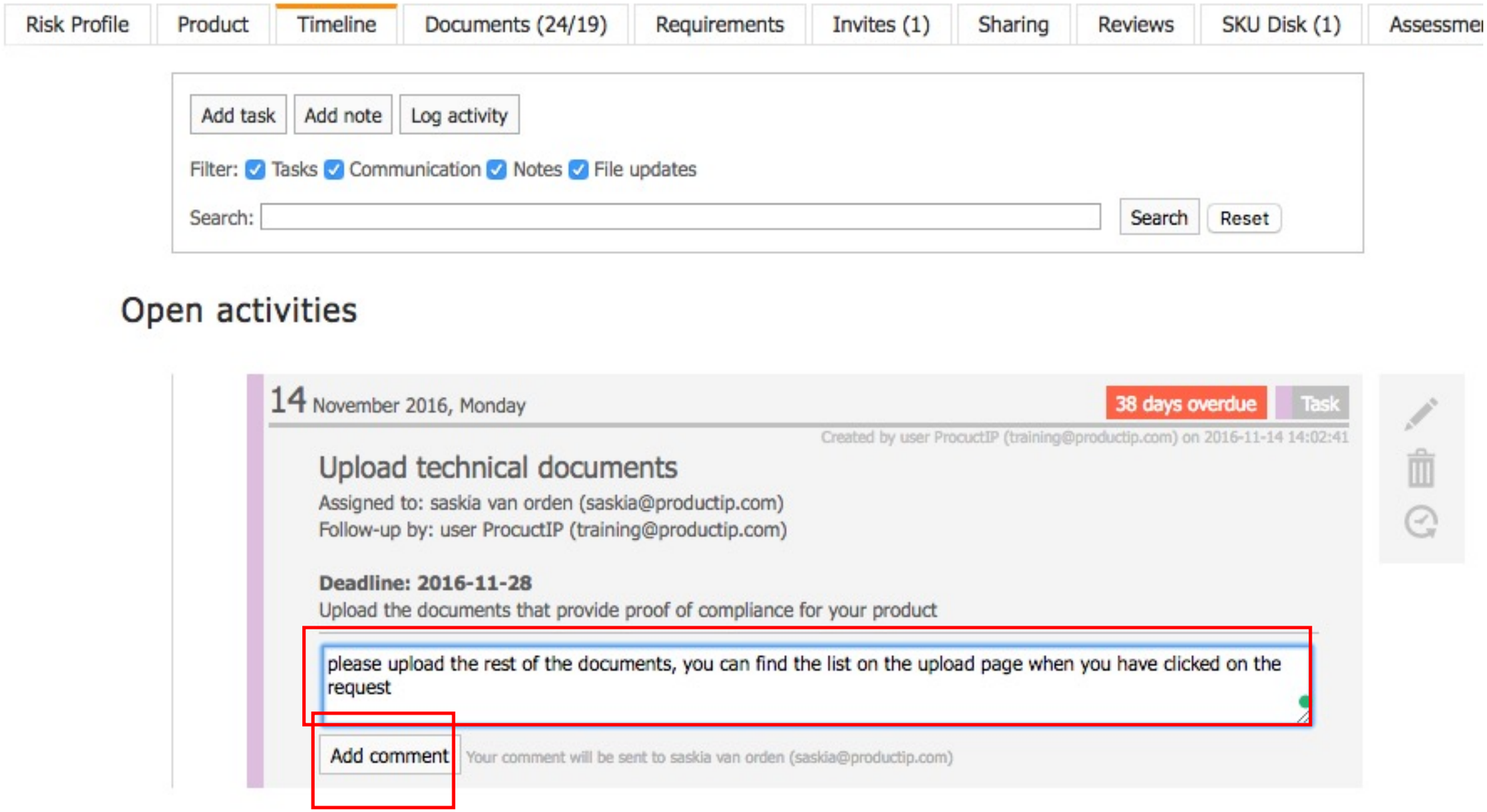
In some cases, there is a period in which two standards can be applied and so you have a choice. Set the standards of the requirements listed on the test report to fulfilled when you link the document, and make the previous or succeeding standards not applicable.

| Requirements | Category | Expiry Date | Required documents | Regions |
|---|---|---|---|---|
| **Low Voltage Directive (LVD) 2014/35/EU - recast of 2006/95/EC** (7/13) | | | | |
| EN 60065:2002 (LVD) (1) | A | 2017-11-17 | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |
| EN 60065:2002/AC:2007 (1) | A | 2017-11-17 | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |
| EN 60065:2002/AC:2006 (1) | A | 2017-11-17 | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |
| EN 60065:2002/A12:2011 (1) | A | 2017-11-17 | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |
| EN 60065:2002/A11:2008 (1) | A | 2017-11-17 | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |
| EN 60065:2002/A2:2010 (1) | A | 2017-11-17 | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |
| EN 60065:2002/A1:2006 (1) | A | 2017-11-17 | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |
| EN 60065:2014 (LVD) (0) | A | 2019-06-20 | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |
| EN 60065:2014/AC:2016 (LVD) (0) | A | 2019-06-20 | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |
| EN 62368-1:2014 (0) | A | | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |
| EN 62368-1:2014/AC:2015-02 (0) | A | | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |
| EN 62368-1:2014/AC:2015-05 (0) | A | | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |
| EN 62368-1:2014/AC:2015-11 (0) | A | | Low Voltage Directive (LVD) - Certificate<br>Low Voltage Directive (LVD) - Test report | |

| | |
|---|---|
| **Date of publication** | 2015-04-17 |
| **Date of withdrawal** | 2017-11-17 |
| **Supersedes:** | EN 60065:2002 (LVD) |
| **Superseded by:** | EN 62368-1:2014 |
| **Corrected by:** | EN 60065:2014/AC:2016 (LVD) |

# COMMUNICATE VIA THE SYSTEM:

Once the supplier has accepted the invite, you can communicate with each other via the platform.



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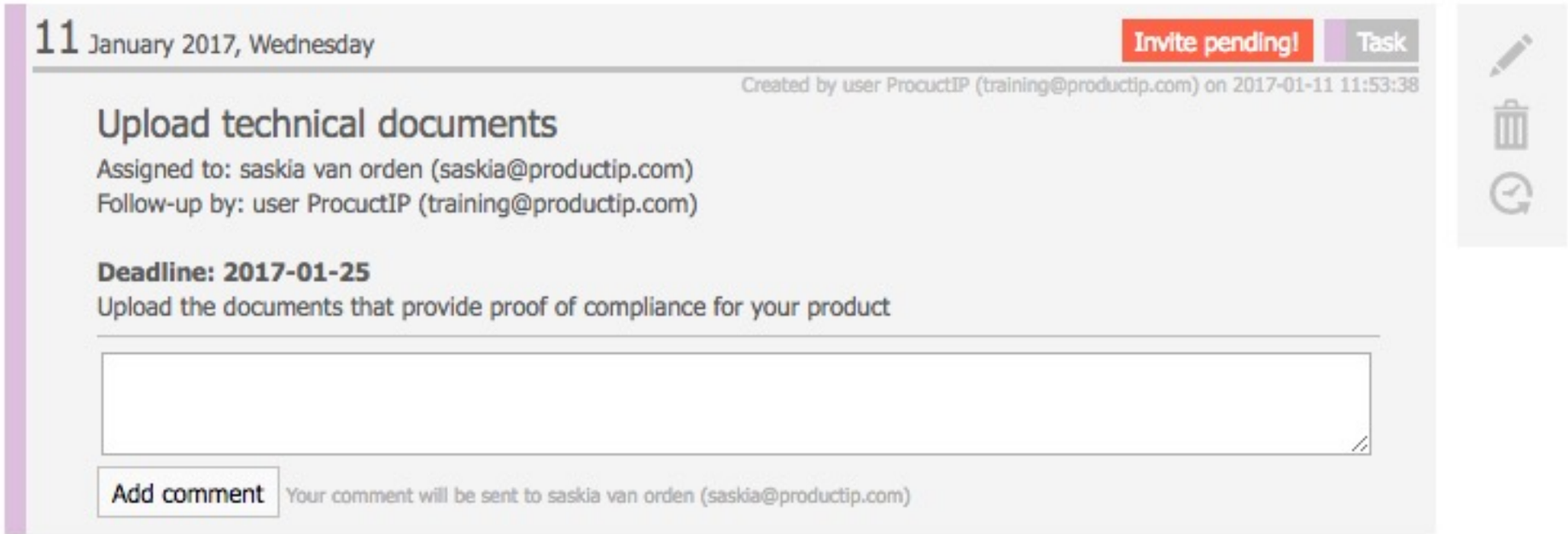
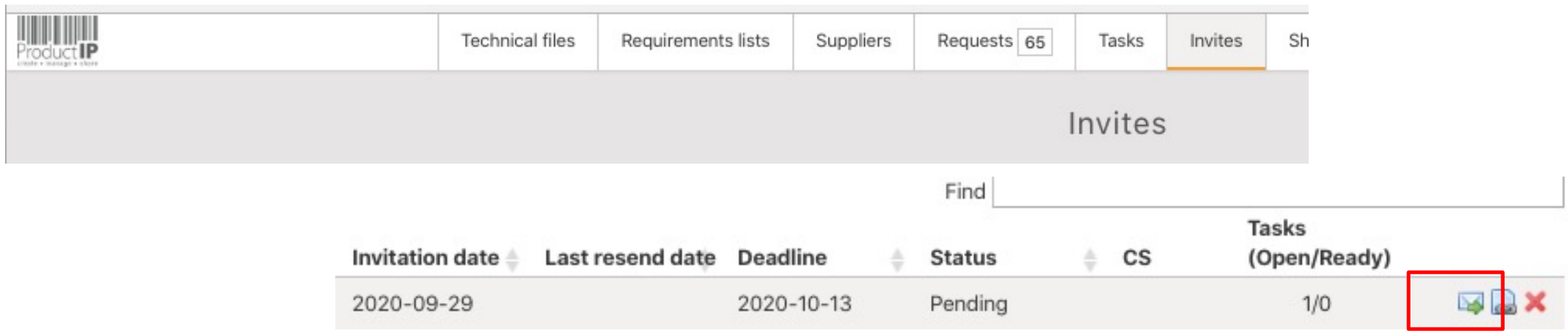
Please note, that if the invitation is not accepted, no email will be sent.

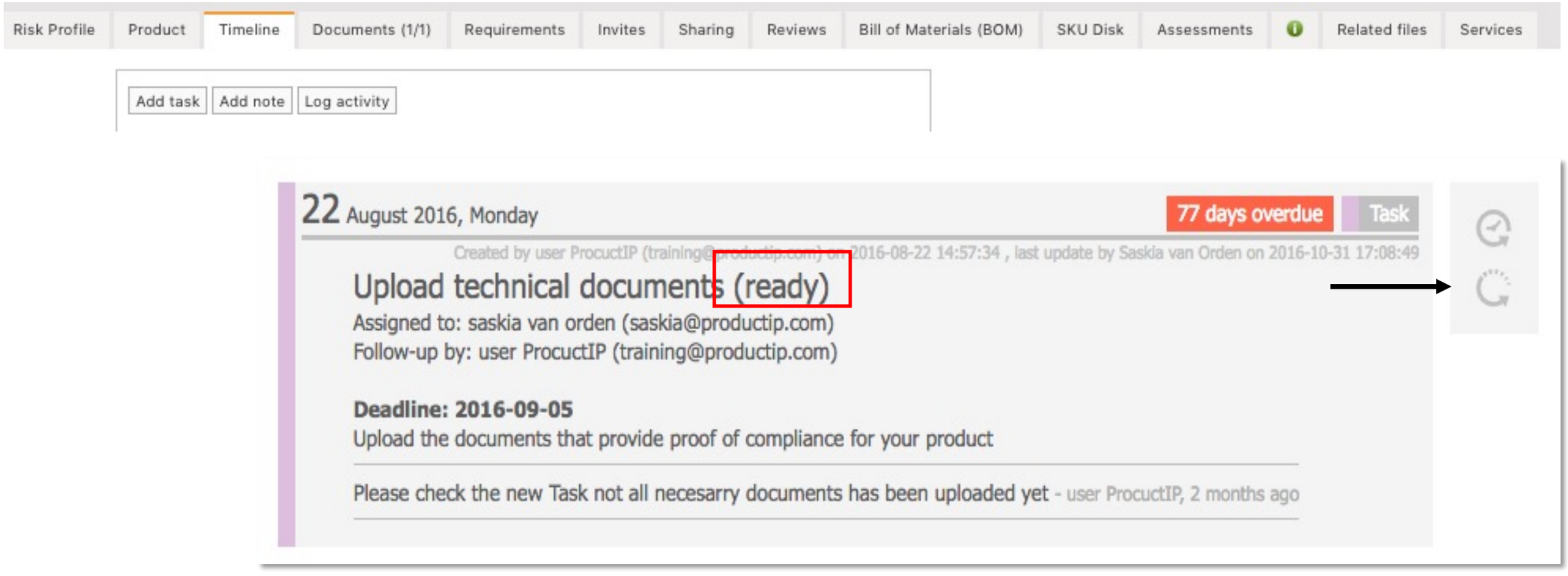


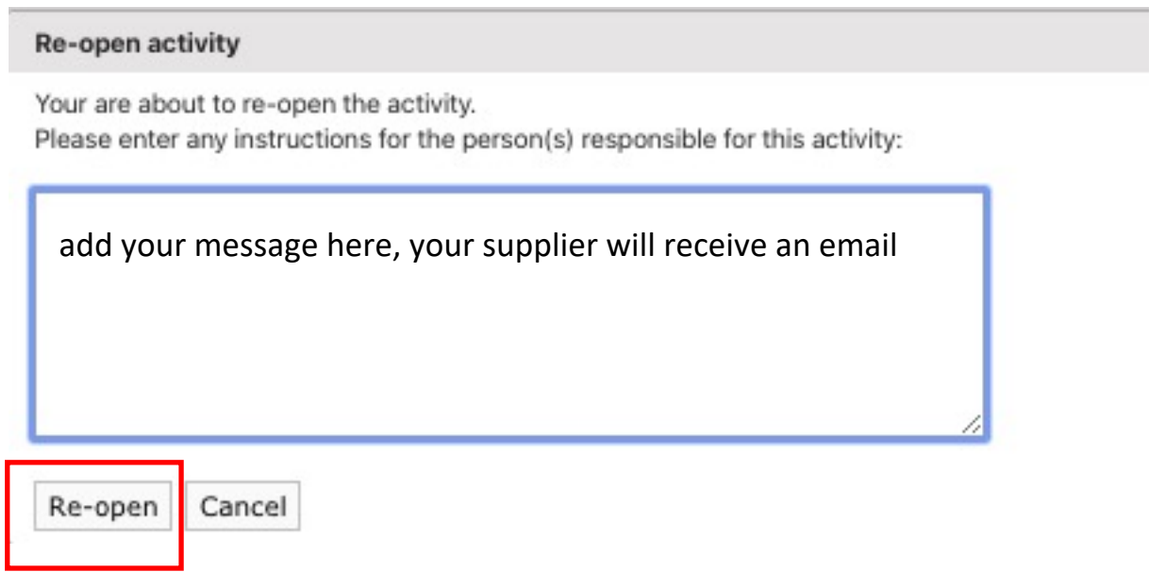

The supplier will then have to be urged to accept the invitation by means of his own communication. However, if you can send the invitation again, the supplier will receive another e-mail of the invitation.



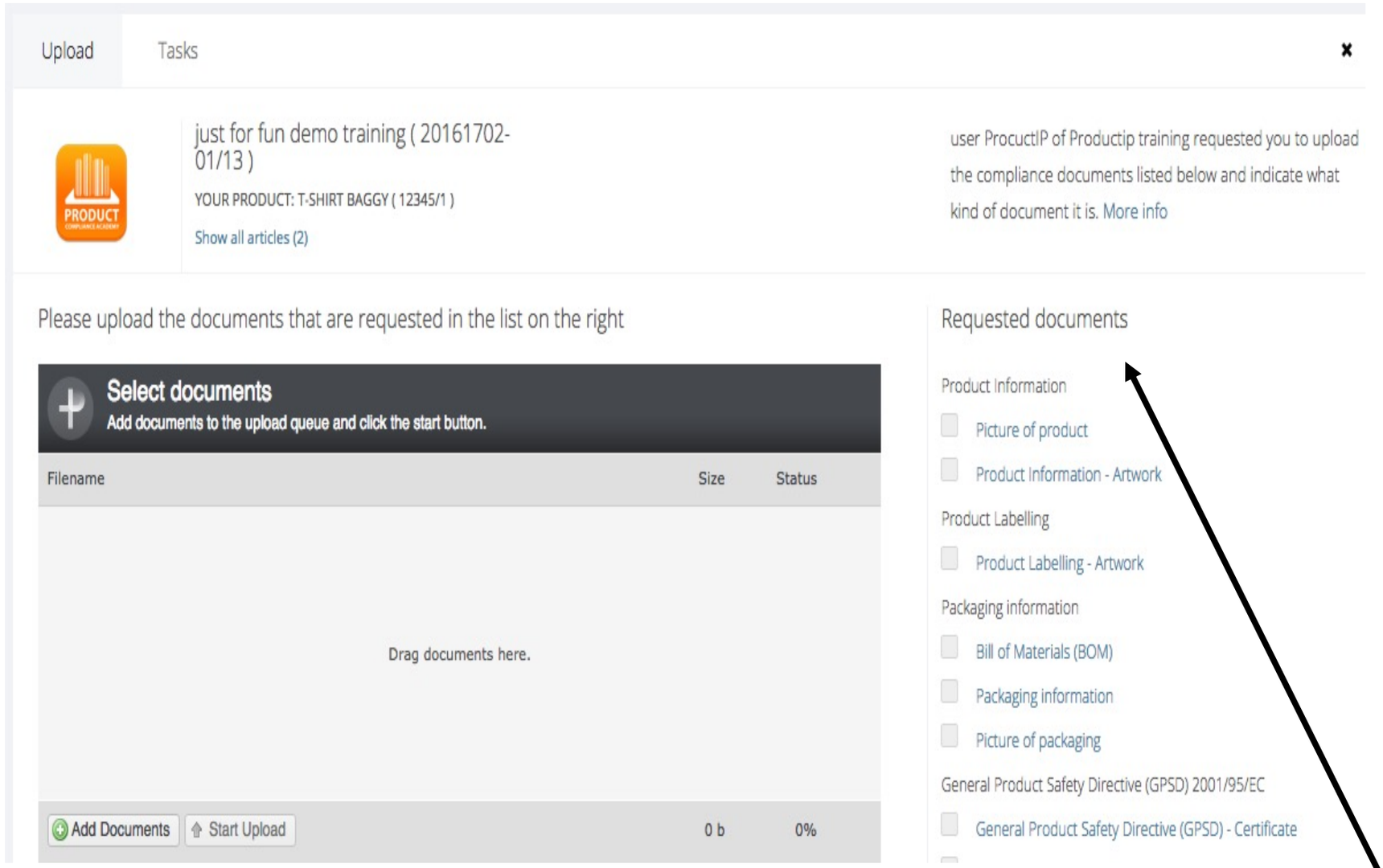
# ASK YOUR SUPPLIER FOR MORE DOCUMENTS:

the supplier has completed the task, but there are still documents missing, re-open the task, add a comment in the window and the supplier will receive an email, and can upload the requested documents again

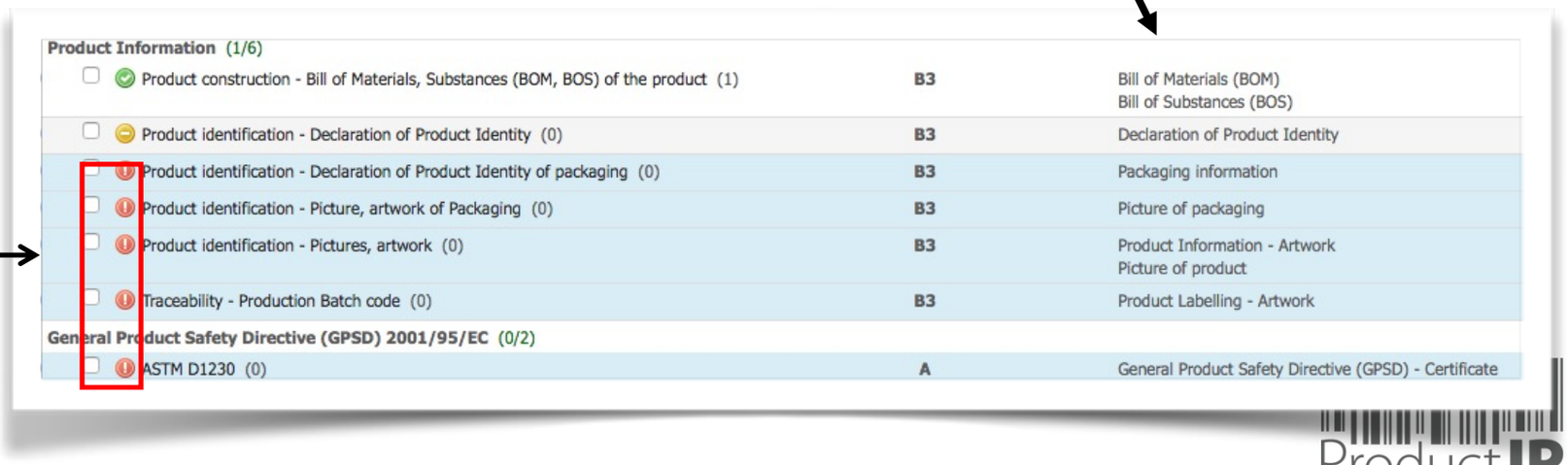


# THIS IS HIS UPLOAD SCREEN:

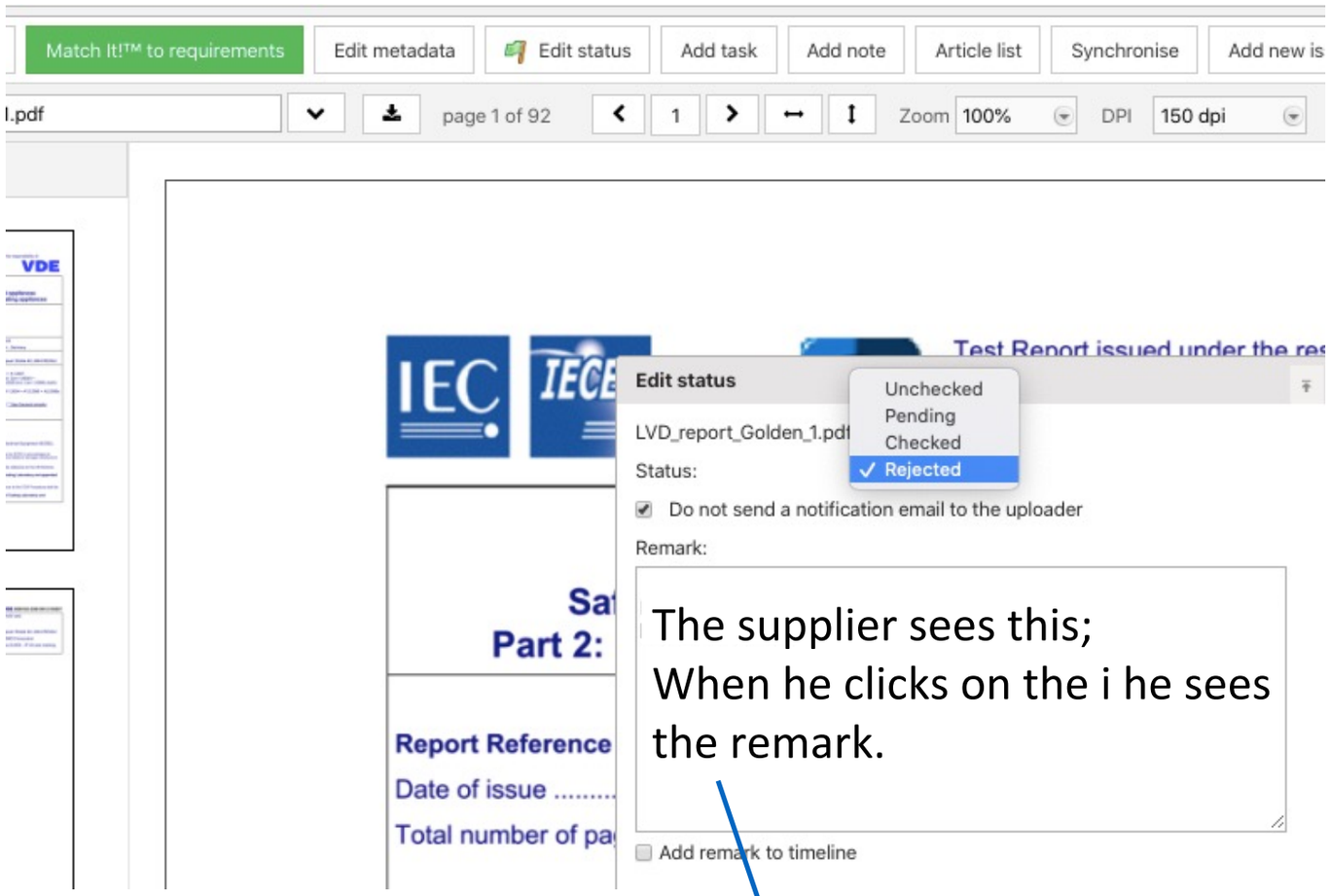



This is what you see in the file, this is not what the supplier sees. But the requirements that are green or yellow are not requested to be documented.



| | | |
|---|---|---|
| **Product Information** (1/6) | | |
| Product construction - Bill of Materials, Substances (BOM, BOS) of the product (1) | B3 | Bill of Materials (BOM)<br>Bill of Substances (BOS) |
| Product identification - Declaration of Product Identity (0) | B3 | Declaration of Product Identity |
| Product identification - Declaration of Product Identity of packaging (0) | B3 | Packaging information |
| Product identification - Picture, artwork of Packaging (0) | B3 | Picture of packaging |
| Product identification - Pictures, artwork (0) | B3 | Product Information - Artwork<br>Picture of product |
| Traceability - Production Batch code (0) | B3 | Product Labelling - Artwork |
| **General Product Safety Directive (GPSD) 2001/95/EC** (0/2) | | |
| ASTM D1230 (0) | A | General Product Safety Directive (GPSD) - Certificate |

# The supplier can see the status of the document:

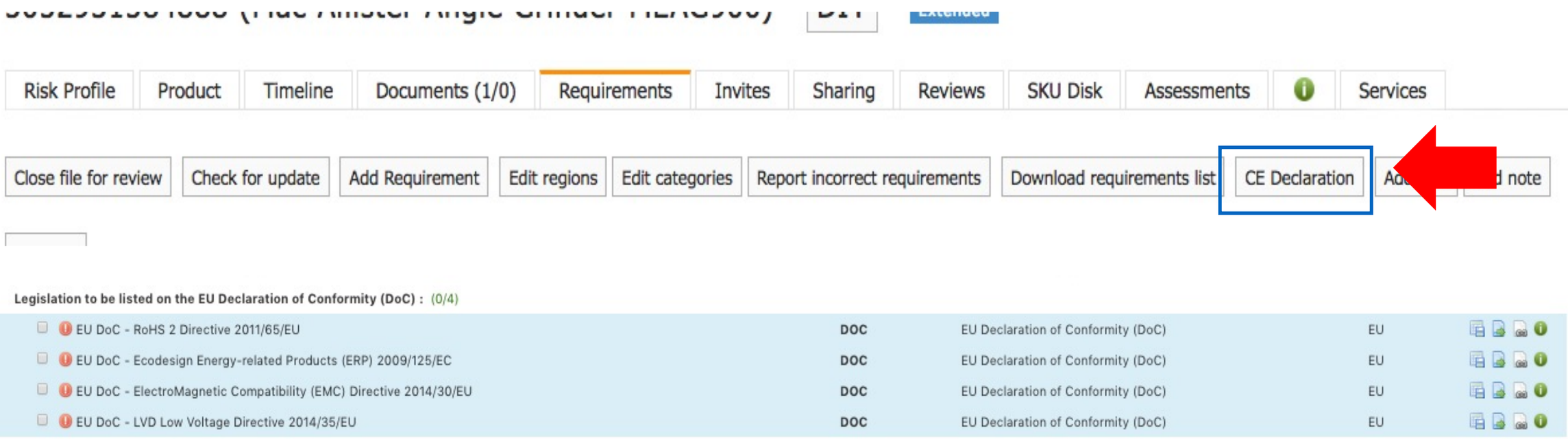


# Create the CE declaration:

For articles to which the CE marking applies, it is easy to make a declaration via the system in the various languages.

You can find on the requirement list, what should be listed on the declaration.

When you have collected all evidence for those requirements you can draw up the declaration



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A word document will be generated, all required requirements will be mentioned on this documents on this document, except when you made it not applicable



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## 2e golden (Golden File #1) - DIY - Extended

Risk Profile | Product | Timeline | Documents (29/0) | Requirements | Invites | Sharing (1) | Reviews | SKU Disk | Assessments | Services

Close file for review | Check for update | Add Requirement | Edit regions | Edit categories | Report incorrect requirements | Download requirements list | CE Declaration | Add task | Add note

**EU Declaration of Conformity (DoC)** (3/3)
- DoC - CE - RoHS 2 Directive 2011/65/EU (1)
- DoC - CE - ElectroMagnetic Compatibility (EMC) Directive 2004/108/EC (1)
- DoC - CE - LVD Low Voltage Directive 2006/95/EC (1)

**Low Voltage Directive (LVD) 2014/35/EU - recast of**
- EN 60065:2002 (LVD) (0)
- EN 60065:2002/AC:2007 (0)
- EN 60065:2002/AC:2006 (0)
- EN 60065:2002/A12:2011 (0)
- EN 60065:2002/A11:2008 (0)
- EN 60065:2002/A2:2010 (0)
- EN 60065:2002/A1:2006 (0)
- EN 60065:2014 (LVD) (0)
- EN 60065:2014/AC:2016 (LVD) (0)
- EN 62368-1:2014 (0)
- EN 62368-1:2014/AC:2015-02 (0)
- EN 62368-1:2014/AC:2015-05 (0)
- EN 62368-1:2014/AC:2015-11 (0)

**Electromagnetic Fields (EMF)** (0/1)
- EN 62311:2008 (LVD) (0)

**THE PRODUCTS MENTIONED IN THIS DECLARATION ARE IN CONFORMITY WITH:**

**EU Community Legislation**
Harmonised standards

**Low Voltage Directive (LVD) 2014/35/EU - recast of 2006/95/EC**
~~EN 60065:2002 (LVD)~~ + AC:2006 + A1:2006 + AC:2007 + A11:2008 + A2:2010 + A12:2011 + EN 60065:2014 (LVD) + AC:2016 (LVD)
EN 62368-1:2014/AC:2015-11 + AC:2015-02 + EN 62368-1:2014 + AC:2015-05

**Electromagnetic Fields (EMF)**
EN 62311:2008 (LVD)

**Electro-Magnetic Compatibility (EMC) Directive 2014/30/EU - recast of 2004/108/EC**
EN 55013:2013
EN 55020:2007 + A11:2011
EN 55032:2012 + AC:2013 + EN 55032:2015
EN 61000-3-2:2006 + A2:2009 + A1:2009 + EN 61000-3-2:2014
EN 61000-3-3:2013

**Restriction of Hazardous Substances Directive (RoHS) 2011/65/EU**
EN 50581:2012

**Energy-related Products Directive (ERP) 2009/125/EC**
Commission Regulation (EC) 1275/2008 - ecodesign requirements standby and off mode electrical power consumption

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