WESR Requirements Reading Guide — Definitions & Interpretation Rules (v1.0)

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Applies to: All WESR rule sets and their Requirements-for-Training (RFT) documents

1. Purpose

This Reading Guide governs how to interpret, implement, and audit all WESR Requirements-for-Training (RFT) documents. It defines wording, applicability, traceability, and assessment/evidence expectations to ensure providers and auditors read requirements the same way.

2. Normative vs Informative

- **Normative** (shall/must): mandatory, auditable minimum requirements.

- **Informative** (notes/examples): explanatory material; not auditable unless adopted into provider procedures.

3. Wording Hierarchy

- **Shall / Must** — mandatory.

- **Should** — recommended; deviations require written justification and risk rationale.

- **May / Can** — optional or allowed.

- **Note / Example** — informative only.

4. Scope & Applicability Logic

Apply by **Rule Set** (HV-OPS, LV-OPS, COHE, ESI, EIR, LI-PROC), **Role** (PCEI, D-PCEI, PCWA, IL, IV, LU, HV-SA, HV-TL, PREI), **Site context** (on/offshore), and **Task type** (dead work, vicinity, testing, lockout, access). Where two rules conflict, apply the **more stringent** control. For mixed systems, apply the rule set for the **highest hazard** unless systems are physically segregated.

5. Identification & Traceability Rules

- Every requirement, learning objective (LO), assessment item, and evidence type has a **unique ID**.

- Cross-reference model: **Clause → Topic → LO → Content → Assessment → Evidence → Role(s)**.

- Use controlled IDs for forms and safety documents (e.g., LI-HE-001, ILOR-HE-001, GLSS-HE-001, SIBA-HE-001, APLR-HE-001, RISK-W-HE-001, TEP-HE-001, EDC-HE-001).

- RFTs shall embed a **Matrix K1** implementing the cross-reference model.

6. Outcome Taxonomy & LO Structure

Each LO includes: **ID, Verb, Condition, Standard, Clause Ref(s), Role(s)**. Verbs must be measurable and paired with **condition + performance standard**. Example: *Given a multi-energy system and an approved template, **produce** a complete LI listing all isolation points and stored-energy controls with zero omissions*.

7. Content Depth & Illustration Rules

Content requirements specify depth per topic (Shall/Should/May) and any **mandatory illustrations/diagrams** (placeholders are allowed but content intent is mandatory). Where figures depict safety-critical steps, they shall include **labels and callouts**.

8. Practical Training & Scenario Design

Practicals define **task, setup/inputs, hazard controls, steps, failure modes to provoke, acceptance criteria, evidence**. Where independence is required (e.g., IL vs IV), roles shall be **separated** and recorded as such.

9. Assessment Governance

- **Theory:** blueprint-based exam; **pass mark ≥ 80%**.

- **Practical:** rubric-based with observable behaviors and **critical errors** (any critical error = fail).

- **Re-test policy:** Failure of theory (<80%) or any critical error requires **course retake**. Same-day re-attempt may be permitted for non-critical errors at assessor discretion (single station).

- **Assessor independence:** Practical assessors shall be competent and calibrated; IL and IV for the same scenario should not be signed by a single assessor.

10. Evidence Model & Learner Records

Mandatory artifacts: attendance, theory score report, **signed practical rubrics**, copies of all completed forms (e.g., LI/ILOR/GLSS/APLR/SIBA/TEP/RISK-W/EDC), photos/video where specified, **participant end-of-training acknowledgement** with **complaint option**, and assessor notes. All artifacts shall be **date-stamped**, **ID-linked**, and tamper-evident in the record system.

11. Role Filters & Variants

Role-specific extracts are created by filtering Matrix K1; IDs **must remain stable**. Providers may not remove mandatory elements for a role even if another role's variant omits them.

12. Equivalency / Credit Transfer

Credit may be granted only where providers hold a **documented mapping** from prior training to each LO, assessment, and evidence type; mapping evidence joins the learner's record.

13. Standards Scope (Normative Families)

RFTs shall reference **EU/IEC/ISO** standards only (unless an RFT explicitly extends scope). Families typically include: EN 50110-1 (operation of electrical installations), EN ISO 14118 (prevent unintended start), EN ISO 14119 (interlocking devices), ISO 12100 (risk), ISO 13849-1 (safety-related parts), ISO 4413/4414 (hydraulic/pneumatic fluid power), IEC 60204-1 (electrical equipment of machines), IEC/EN 60900 (insulated tools), EN 60903 (gloves), IEC 61482-2 (arc PPE), ISO 7010 (safety signs), EU Machinery Regulation (EU) 2023/1230. RFTs shall list the exact editions they rely on.

14. Change Management & Versioning

Use semantic versioning **vMajor.Minor.Patch**. Record changes in the **Change-of-Record** table with reason and risk note. Safety-critical corrections may be released as errata with immediate effect.

15. Audit Method

Auditors assess conformance by sampling **Matrix K1 links** end-to-end: requirement → LO → content → assessment → evidence → role. Non-conformities are graded **Minor / Major / Critical** with defined correction timelines and re-audit triggers.

16. Nomenclature & Definitions ("Ananometer" Section)

This section defines terms and abbreviations used across WESR RFTs so that auditors interpret wording consistently.

Core abbreviations
- **PREI** — Process Responsible Electrical Individual.
- **PCEI / D-PCEI** — Person in Charge of Electrical Installation / Delegated.
- **PCWA** — Person in Control of Work Area.
- **IL / IV** — Isolation Leader / Isolation Verifier.
- **LU** — Lockout User.
- **LI / ILOR / GLSS / SIBA / APLR / TEP / RISK-W / EDC** — Controlled forms and processes used in COHE.
- **RFT** — Requirements-for-Training document.

Terms
- **Critical error:** A single action or omission that, by definition in a rubric, results in failure.
- **Independence:** Separation of responsibilities to prevent self-validation (e.g., IL ≠ IV).
- **Matrix K1:** The controlling cross-reference matrix within an RFT linking clauses to LOs, content, assessments, evidence, and roles.
- **Variant:** A filtered view of the RFT targeting a specific role without changing IDs.

17. Document Control & Retention (Summary)

Refer to the **WESR Branding & Document Control Model** for coding, ownership, approvals, distribution, and retention minimums. RFTs shall reproduce the relevant retention lines within Section H (Evidence & Records).

18. Governance Dependencies

This Reading Guide is a normative prerequisite for all RFTs and shall be cited in each RFT's metadata. Providers and auditors shall be trained on this guide before delivering or auditing any WESR training.

Annex A — Glossary (Expandable)

- **Dead work:** Work performed with all sources isolated and verified at zero energy.

- **Vicinity work:** Work near live parts within defined approach boundaries with controls applied.

- **SIMOPS:** Simultaneous operations with potential interaction.

Annex B — Matrix K1 Generation Rules (Provider Tooling)

- Maintain a single source of truth (IDs immutable).

- Exports (role-filtered) must retain originating IDs and include a header noting the filter applied.

- Each record in K1 must be complete; blanks are non-conformities.

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