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INTERNATIONAL STANDARD

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Human machine interfaces for process automation systems

Interfaces homme-machine pour les systèmes d'automatisation des processus

Document Preview

IEC 63303:2024

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HUMAN MACHINE INTERFACES FOR PROCESS AUTOMATION SYSTEMS

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Draft	Report on voting	
65A/1115/FDIS	65A/1128/RVD	

Full information on the voting for its approval can be found in the report on voting indicated in the above table.

The language used for the development of this International Standard is English.

This document was drafted in accordance with ISO/IEC Directives, Part 2, and developed in accordance with ISO/IEC Directives, Part 1 and ISO/IEC Directives, IEC Supplement, available at www.iec.ch/members_experts/refdocs. The main document types developed by IEC are described in greater detail at www.iec.ch/publications.

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INTRODUCTION

The purpose of this document is to address the philosophy, design, implementation, operation, and maintenance of human machine interfaces (HMIs) for automation systems, including multiple work processes throughout the HMI life cycle. It is intended to help users to better understand the style of HMI recommended by this document.

It is assumed that the reader has a fundamental knowledge of basic HMI functionality.

This document was derived from ANSI/ISA-101.01-2015 Human Machine Interfaces for Process Automation Systems.

This document defines the terminology and models to develop an HMI and the work processes recommended to effectively maintain the HMI throughout its life cycle. This document can be used to:

- provide guidance to design, build, operate and maintain HMIs to achieve a safer, more effective, and more efficient control system under all operating conditions, and
- improve the user's abilities to detect, diagnose, and properly respond to abnormal situations.

The HMI is the collection of hardware and software used to monitor and interact with the control system and ultimately with the process.

In some cases, the primary user(s) operate equipment from different suppliers that have their own HMI system standards, and it is impractical to achieve uniformity across these HMI systems or the ideal adherence to the asset owner's HMI system standards.

In such cases, the asset owner should perform a formal assessment of deviations of each equipment HMI from the asset owner's HMI philosophy. This assessment should consider human factors engineering and task analysis.

The outcome of the assessment should determine if any mitigations are required to ensure the safe and efficient control of the process including start-up, operation, and shutdown, in addition to early detection, diagnosis, and proper response to abnormal situations.

The proper design and implementation of HMI systems as described in this document will result in increased efficiencies and reduced stress of the users. Other factors such as ergonomics and overall design of the control room also contribute to potential stressors that need to be managed. International Standard series ISO 11064 "Ergonomic design of control centres" has been developed to address the broader control room environment.

This document is organized into ten clauses. The first three clauses are introductory in nature. Clause 4 presents user types. Clause 5 introduces the life cycle model for the HMI. Clauses 6 through 10 provide additional details to support the HMI life cycle. The main body of this document (Clauses 4 to 10) presents mandatory requirements and non-mandatory recommendations.

HUMAN MACHINE INTERFACES FOR PROCESS AUTOMATION SYSTEMS

1 Scope

1.1 General applicability

This document defines general structures and functions of HMI systems.

An HMI life cycle example for HMI systems is included.

This document specifies requirements and recommendations for activities in each stage of the life cycle including designing, using, and maintaining the HMI system.

It also provides requirements and recommendations for functions and performance of HMI systems.

The requirements and recommendations in this document are applicable to any controlled process using an HMI to interface to a control system. There can be differences in implementation to meet the specific needs based on the application and controlled process type.

1.2 Exclusions

1.2.1 Management of change (MOC)

Some requirements and recommendations to be included in a MOC procedure are included in this document. However, a specific MOC procedure has not been included in this document.

1.2.2 Jurisdictions

In some jurisdictions, the governing authorities (e.g. national, federal, state, province, county, city) have established process safety design, process safety management, or other requirements.

1.2.3 Purchase specification

This document is not intended to be used as a human machine interface system selection or purchase specification, although at the discretion of the person specifying or requiring it, suppliers could be requested to provide an HMI system including the features mentioned herein. This document does not eliminate the need for sound engineering judgment. No HMI platform or technology is mandated nor implied.

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

IEC 62381, Automation systems in the process industry – Factory acceptance test (FAT), site acceptance test (SAT), and site integration test (SIT)

IEC 62443 (all parts), Security for industrial automation and control systems

3 Terms, definitions and abbreviated terms

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

- IEC Electropedia: available at https://www.electropedia.org/
- ISO Online browsing platform: available at https://www.iso.org/obp

3.1 Terms and definitions

3.1.1

abnormal situation

disturbance in an industrial process during which the control system cannot keep the process within normal operating parameters

3.1.2

alarm

audible and/or visible means of indicating to the operator an equipment malfunction, process deviation, or abnormal condition requiring a timely response

[SOURCE: IEC 62682:2022, 3.1.7]

3.1.3

aspect ratio

ratio between the total horizontal and total vertical dimensions on a screen

Note 1 to entry: Displays designed for one aspect ratio screen (e.g. 4:3) can appear distorted when shown on a screen with a different aspect ratio (e.g. 16:9).

3.1.4

asset owner

role of an organization responsible for one or more industrial automation and control systems (IACSs)

Note 1 to entry: The term "asset owner" is used in place of the generic term "end user" to provide differentiation.

Note 2 to entry: This definition includes the components that are part of the IACS.

Note 3 to entry: In the context of this document, asset owner also includes the operator of the IACS.

[SOURCE: IEC 62443-3-3:2013, 3.1.2, modified to be role-based.]

3.1.5

auditory coding

use of auditory signals to convey information to operators

3.1.6

auditory signal

particular, unique, recognizable sound used to convey a particular, unique meaning

3.1.7

call up time

lapsed time for all display elements to be refreshed after a display change has been requested

3.1.8

chromatic distortion

colour fringing or smearing caused by unequal focusing of different colours

3.1.9

commissioning

procedures prior, or related, to handing over a system for placing into service

Note 1 to entry: These procedures often include acceptance testing (FAT, SAT, and SIT); handing over of drawings and documentation; delivering instructions for operation, maintenance, and repair; and providing training to personnel.

3.1.10

console

hardware, software, and furniture or enclosure at which users monitor and/or control the process, which can include multiple stations, communication devices, and other devices

EXAMPLE Cameras, barcode devices and pushbutton stations.

Note 1 to entry: See Figure A.1.

3.1.11

control platform

system comprising a programmable automation controller, programmable logic controller, or a distributed control system controller

3.1.12

control room

core functional entity, and its associated physical structure, where control room operators are stationed to carry out centralized control, monitoring and administrative responsibilities

[SOURCE: ISO 11064-1:2000, 3.2, modified – "control room" was added to the definition.]

3.1.13

control system

system that responds to input signals from the equipment under control and/or from an operator and generates output signals that cause the equipment under control to operate in the desired manner

[SOURCE: IEC 62682:2022, 3.1.44, modified – Note 1 to entry and Note 2 to entry were removed.]

3.1.14

controller

hardware which executes functions for monitoring and control of one or more process variables

Note 1 to entry: In some industries, the primary user of the HMI is called the controller.

3.1.15

dashboard

type of display showing summary of various pieces of important information typically used to give an overview of a process or part of a process

3.1.16

display

visual representation of the process and related information used for monitoring and control

Note 1 to entry: See Figure A.1.

3.1.17

display type

display format

graphic layout

description of the generic layout of a display and its presentation of information without referring to any particular content

3.1.18

drill-down

method of navigation in which successive displays show increasing detail for smaller subsets of the system scope

3.1.19

embedded logic

software that is part of the HMI system and performs some of the requirements of that HMI system

3.1.20

faceplate

display, part of a display, or popup used for monitoring and/or direct operation of a single control loop, device, sequence, or other entity

Note 1 to entry: A faceplate contains one or more graphic symbols.

Note 2 to entry: A faceplate is used for group display, popup or other displays.

3.1.21

graphic element

component part of a graphic symbol

Note 1 to entry: Graphic elements consist of objects such as a line and/or circle as shown in Figure A.1.

3.1.22

graphic symbol

graphic object

graphic object visual representation of a process component, instrument, condition, information, or operation interaction in a display

Note 1 to entry: Composed of a combination of single graphic elements. See Figure A.1.

3.1.23

HMI application ai/catalog/standards/iec/1b53e3f4-9e9a-4c38-aed2-8bcb7a22cc67/iec-63303-2024

computer program that is specific to the requirements of the HMI specification

3.1.24

HMI platform

particular family of HMI systems, consoles, or stations capable of using a common HMI toolkit

3.1.25

human factors engineering

scientific discipline concerned with the understanding of interactions between human and other elements of a system that applies theory, principles, data, and methods to design in order to optimize human well-being and overall system performance

3.1.26

human machine interface

HMI

HMI system

collection of hardware and software used by the operator and others to monitor and interact with the control system and with the process via the control system

[SOURCE: IEC 62682:2022, 3.1.56]

3.1.27

HMI security model

information used to develop a detailed program for managing the security of an HMI system

Note 1 to entry: HMI security model is needed to identify the security needs and important characteristics of the environment at a level of detail necessary to address security issues with a common understanding of the framework and vocabulary.

3.1.28

industrial automation and control system

IACS

collection of personnel, hardware, software, procedures and policies involved in the operation of the industrial process and that can affect or influence its safe, secure and reliable operation

3.1.29

keyboard

input device that allows the user to type characters, values, or commands to affect the control system

Note 1 to entry: See Figure A.1.

3.1.30

mobile device

portable device having a display screen with touch, pen and/or keyboard input that utilizes communication networks

3.1.31

monitor

<noun> electronic device for the display of visual information in the form of text and/or graphics

Note 1 to entry: See Figure A.1. Document Preview

3.1.32

monitor

verb> maintain awareness of the state of a process by observing variables or the change of 024 variables against limits or other variables, to keep track of operations and enable timely and appropriate response to abnormal situations

3.1.33

navigation

function which supports users in locating desired information in an HMI-based information system, and also in guiding the selection of displays, or the act of selecting a display

3.1.34

operator

person who monitors and makes changes to the process

Note 1 to entry: The operator is the user that most frequently interacts with the HMI.

3.1.35

pointing device

input device which translates physical movements to movements of a pointer, cursor, or other indicator across the screen

EXAMPLE Mouse, trackball, and touchscreen.

Note 1 to entry: See Figure A.1.