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INTERNATIONAL STANDARD

NORME INTERNATIONALE



HORIZONTAL STANDARD
NORME HORIZONTALE

Preparation of information for use (instructions for use) of products –
Part 1: Principles and general requirements

(standards.iteh.ai)

Élaboration des informations d'utilisation (instructions d'utilisation) des
produits –
Partie 1: Principes et exigences générales

<https://standards.iteh.ai/catalog/standards/sist/a332a342-6f5d-41e7-b110-82079-1-2019>



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CONTENTS

FOREWORD.....	6
INTRODUCTION.....	9
1 Scope.....	11
2 Normative references	12
3 Terms and definitions	13
4 Fulfilment of requirements for information for use	19
4.1 General.....	19
4.2 Evaluation of information for use of consumer products	19
4.3 Documentary evidence of evaluation.....	19
5 Principles	20
5.1 General.....	20
5.2 Purpose of information for use	20
5.2.1 General	20
5.2.2 Information for use as part of the product	20
5.2.3 Target audiences' orientation.....	20
5.2.4 Safe use of the supported product	20
5.2.5 Product's compliance through information for use.....	20
5.3 Information quality	21
5.3.1 General	21
5.3.2 Completeness.....	21
5.3.3 Minimalism	21
5.3.4 Correctness.....	21
5.3.5 Conciseness	21
5.3.6 Consistency.....	22
5.3.7 Comprehensibility	22
5.3.8 Accessibility.....	22
5.4 Use of repeatable processes.....	22
6 Information management process	23
6.1 General.....	23
6.2 Analysis and planning of information	23
6.2.1 General analysis.....	23
6.2.2 Target audiences.....	24
6.2.3 Media	24
6.2.4 Languages.....	25
6.2.5 Information sources	25
6.2.6 Information sustainment	25
6.2.7 Risk management.....	26
6.2.8 Contractual agreements and legal constraints.....	26
6.2.9 Project management and control	26
6.2.10 Configuration management.....	26
6.2.11 Human resource management	27
6.2.12 Quality assurance.....	27
6.3 Design and development, including review, editing, and testing	27
6.3.1 General	27
6.3.2 Design, information gathering and development.....	27
6.3.3 Reviewing, editing and testing	28

6.4	Production and distribution.....	29
6.5	Sustainment, maintenance and improvement	29
7	Content of information for use	29
7.1	General.....	29
7.2	Identifiers.....	30
7.2.1	Identification of information for use	30
7.2.2	Identification of the supported product	30
7.2.3	Identification of the supplier.....	30
7.3	Importance of retaining printed information for use	30
7.4	Presentational conventions	31
7.5	Terminology.....	31
7.6	Acronyms, abbreviations and technical terms.....	31
7.7	Explanation of safety signs, graphical symbols and markings.....	31
7.8	Product description	32
7.8.1	General description	32
7.8.2	Visualization	32
7.8.3	Specifications	32
7.9	Supplied accessories, consumables and spare parts.....	32
7.9.1	Accessories supplied with the product	32
7.9.2	Consumables.....	33
7.9.3	Spare parts.....	33
7.10	Information for use needed during the lifetime of the supported product.....	33
7.10.1	General	33
7.10.2	Re-packaging of the supported product	33
7.10.3	Transportation and storage of the supported product	33
7.10.4	Installation of the supported product.....	34
7.10.5	Commissioning of the supported product	34
7.10.6	Modification of the supported product	34
7.10.7	Operation of the supported product.....	34
7.10.8	Indications of faults and warning device signals of the supported product	35
7.10.9	Meanings of signals of the supported product	36
7.10.10	Maintenance of the supported product by non-skilled and skilled persons	36
7.10.11	Maintenance of complex systems	36
7.10.12	Troubleshooting and repair of the supported product by non-skilled and skilled persons.....	37
7.10.13	Replacement of parts of the supported product by non-skilled and skilled persons.....	38
7.10.14	Disassembly, recycling, disposal of the supported product.....	38
7.11	Safety-related information	39
7.11.1	Types of safety-related information	39
7.11.2	Location of safety-related information	39
7.11.3	Precautions for particular target audiences	39
7.11.4	Safety notes	40
7.11.5	Warning messages	40
7.11.6	Safety-related information in quick-start guides	41
7.12	Instructions for assembly of self-assembly products.....	41
7.13	Information for use for a complex system	42
7.14	Information security and data privacy.....	42

7.14.1	General	42
7.14.2	Functions for access control or protection of sensitive data	42
7.15	Training	43
8	Structure of information for use	43
8.1	General.....	43
8.2	Information types	43
8.3	Structuring	44
8.3.1	General	44
8.3.2	Use of information models	44
8.3.3	Use of leading criteria.....	44
8.3.4	Detailed structure of step-by-step instructions	45
8.4	Navigation and information delivery	46
8.4.1	General	46
8.4.2	Navigating printed information for use	46
8.4.3	Dynamic delivery	46
9	Media and format of information for use.....	47
9.1	General.....	47
9.2	Durability of chosen media.....	48
9.3	Use of animation or audio-visual demonstrations	48
9.4	Location and availability.....	48
9.5	Printable information.....	48
9.6	User interaction and search features.....	49
9.7	Downloadable information for use	49
9.8	Suitability for the conditions of use of the supported product.....	49
9.9	Consistency of format.....	49
9.10	Legibility, readability and comprehensibility.....	50
9.10.1	Text font sizes and heights of safety signs and graphical symbols	50
9.10.2	Maximum brightness contrast	52
9.10.3	Information for use provided on the supported product or packaging	52
9.10.4	Minimum heights of safety signs and graphical symbols	52
9.10.5	Rules for simple wording	52
9.10.6	Function of information sections	52
9.11	Use of visualization.....	52
9.11.1	Graphical symbols and safety signs.....	52
9.11.2	Illustrations.....	53
9.11.3	Information content of illustrations	53
9.11.4	Illustration with captions	53
9.12	Use of tables.....	53
9.13	Use of colours.....	53
9.14	Use of icons.....	53
9.15	Attracting attention to safety-related information	54
9.15.1	General	54
9.15.2	Durability and visibility.....	54
10	Professional competencies	54
10.1	General.....	54
10.2	Task-related competencies	54
10.3	Level of proficiency.....	55
10.3.1	General	55
10.3.2	Proficiency level 1	55

10.3.3	Proficiency level 2	55
10.3.4	Proficiency level 3	56
10.4	Competencies of translators.....	56
Annex A (informative)	Guidance on evaluation.....	57
A.1	General.....	57
A.2	Assessing fulfillment of requirements for information for use supporting a particular product.....	57
A.2.1	Comprehensiveness check	57
A.2.2	Inspection for effectiveness (desk check)	57
A.2.3	Empirical effectiveness check.....	57
A.2.4	Useful additional checks	58
A.3	Evaluating the fulfilment of requirements for an information management process.....	58
A.3.1	Process evaluation	58
A.3.2	Competency evaluation	58
A.4	Guidance on conducting an evaluation.....	58
A.4.1	Result of the evaluation and corrective actions	58
A.4.2	Evaluation of similar information for use (conferrable evaluations).....	59
Bibliography	60
Figure 1	– Concept of information for use	9
Figure 2	– Examples for notice to retain information	31
Table 1	– Examples of empirical methods.....	28
Table 2	– Structuring principles.....	45
Table 3	– Examples of considerations for the choice of media	49
Table 4	– Minimum recommended text font sizes and heights of safety signs and graphical symbols	51

INTERNATIONAL ELECTROTECHNICAL COMMISSION

**PREPARATION OF INFORMATION FOR USE
(INSTRUCTIONS FOR USE) OF PRODUCTS –****Part 1: Principles and general requirements**

FOREWORD

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International Standard IEC/IEEE 82079-1 has been prepared by IEC technical committee 3: Information structures and elements, identification and marking principles, documentation and graphical symbols, in cooperation with the Computer Society, Systems and Software Engineering Standards Committee of the IEEE, under the IEC/IEEE Dual Logo Agreement and in cooperation with subcommittee 1: Basic conventions of ISO technical committee 10: Technical product documentation.

It is published as an IEC/ISO/IEEE triple logo standard.

It has the status of a horizontal standard in accordance with IEC Guide 108 [59].

This second edition cancels and replaces the first edition published in 2012. This edition constitutes a technical revision.

This edition includes the following significant technical changes with respect to the previous edition:

- a) The structure of this document has been rearranged in order to facilitate application of the standard and to make it easier to find information. Where possible, the language has been simplified.
- b) Information for use is introduced as a generic term. Instructions for use is a synonym for information for use. Step-by-step instructions is used as a subset of information for use.
- c) Clause 5 (principles) is revised and focuses on the purpose of information for use, the quality of information and the process for management of information.
- d) The process for preparation of information for use is integrated in the normative part and addressed comprehensively.
- e) Empirical methods for the evaluation of information for use are described in the normative part.
- f) The professional competencies needed for the preparation of information for use are addressed more comprehensively.
- g) Some aspects have been added to general requirements for information for use for complex systems of systems.
- h) Consideration is given to instructions for self-assembly products.
- i) An informative annex providing guidance on the fulfilment of specified requirements is introduced.

The text of this International Standard is based on the following IEC documents:

FDIS	Report on voting
3/1390/FDIS	3/1401/RVD

Full information on the voting for the approval of this International Standard can be found in the report on voting indicated in the above table.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 2.

A list of all parts of the 82079 International Standard, published under the general title *Preparation of information for use (instructions for use) of products*, can be found on the IEC website.

The committee has decided that the contents of this document will remain unchanged until the stability date indicated on the IEC website under "<http://webstore.iec.ch>" in the data related to the specific document. At this date, the document will be

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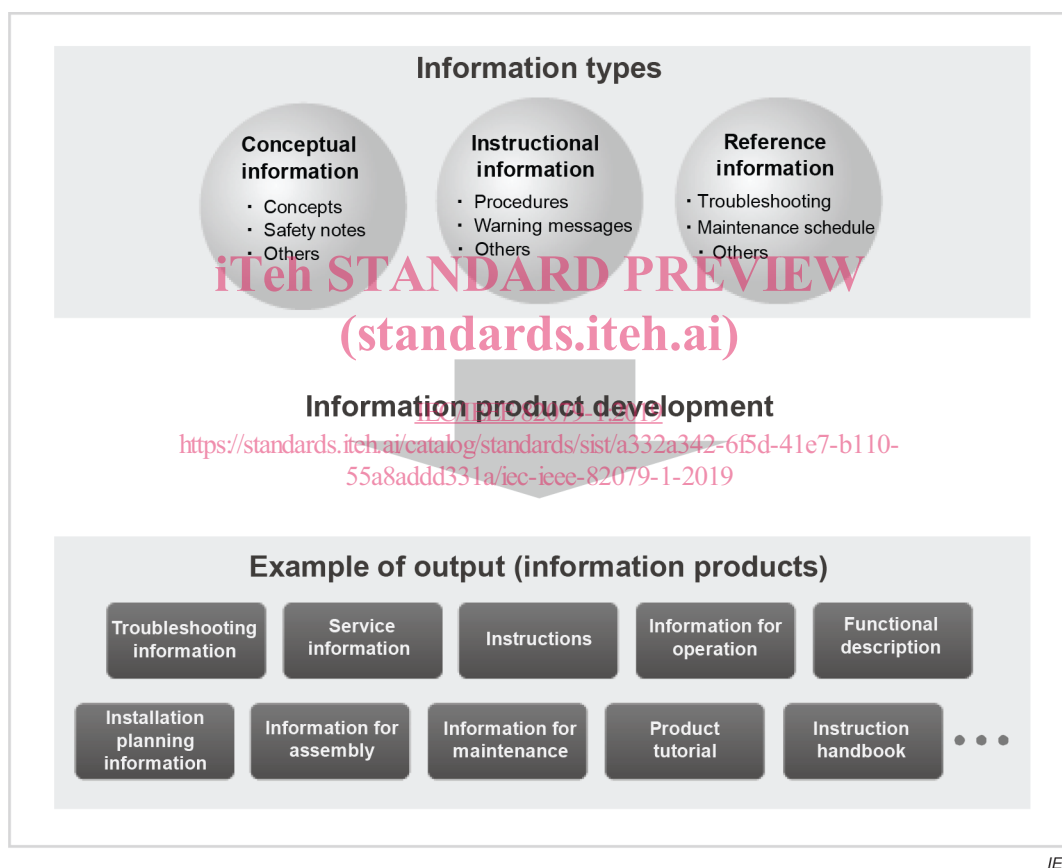
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INTRODUCTION

Information for use is a part of any type of product it supports. A product can be a system, a service, goods, software, information, or a combination thereof. People depend on the information provided to use products safely, effectively, and efficiently, unless they receive training from a human instructor or unless the functions are entirely intuitive. Confusing product information and inadequate instructions are major sources of frustration for consumers and skilled workers. Defective information can pose a risk of harm or loss, leading to prosecution or liability claims against the supplier or brand owner.

Information for use consists of three information types: conceptual information that the target audience needs to understand, instructional information to be followed or considered, and reference information to be consulted when needed. The information for use can include various information products that are selected, presented, and delivered on different media to meet the needs of different target audiences (Figure 1).



IEC

Figure 1 – Concept of information for use

Some product-specific information requirements (e.g. the wording of warnings or positioning of labels) are specified in standards for individual types or classes of products, but these do not provide a complete set of requirements for information for use. This document gives principles and general requirements for conveying information to users that are as applicable to complex and safety-critical systems (e.g. industrial plants), as they are to simple consumer products (e.g. a can of paint), to software, and to specialized testing equipment. Information for use is needed for anyone (skilled and unskilled) who encounters a product for the first time: whether to assemble from a kit, install, operate, maintain, or dispose of it.

The principles for preparing information for use of products are horizontally applicable across product sectors because all target audiences are human and subject to human error. The techniques found to be most effective to help such audiences to absorb new information are generally similar, as are their capabilities for misunderstanding language or images. What

works best in information gathering and delivery (e.g. in content, wording, graphics, testing, and management of the whole process) has emerged from experience and practice in the fields of human factors and technical communication. This document is applicable on its own or can be referenced in product standards that include requirements to provide the target audience with information for use, for example, step-by-step instructions or other information products.

This document is addressed to those who prepare information for use; managers of organizations that produce or purchase products, systems, or services; human factors consultants; and product enforcement agencies.

It covers the following aspects:

- information content: conceptual information the target audiences need to understand, procedures they have to undertake, and the reference information they need to consult at some point;
- options for information to be provided as a single deliverable (e.g. a product manual) or across several types of information product, such as labelling on the product itself or packaging, accompanying electronic files, sheets, a website, booklets, printable files, videos, or searchable databases;
- effective use of language, text, illustrations, symbols, audio or video to communicate elements of information;
- processes and competencies involved in establishing content and preparing output; and
- means of assessing the fulfilment of requirements in accordance with this document.

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PREPARATION OF INFORMATION FOR USE (INSTRUCTIONS FOR USE) OF PRODUCTS –

Part 1: Principles and general requirements

1 Scope

This part of 82079 International Standard provides principles and general requirements for information for the use of products.

Information for use is:

- necessary for the safe use of a product;
- helpful for the efficient and effective use of a product; and
- often necessary to fulfil market, legal, and regulatory obligations.

Products include, for example:

- industrial products (e.g. machinery, components, devices, and equipment);
- consumer products (e.g. household appliances, audio-visual devices, communication devices, and do-it-yourself products);
- medical devices, equipment and systems;
- complex systems of systems (e.g. industrial plants, refineries, production sites, and data centres);
- means of transport (e.g. cars, trucks, ships, and airplanes);
- application software (e.g. office software and web applications);
- software for operation and automatic control of systems; and
- technical services.

Information for use of products applies to phases of the product life cycle such as transport, assembly, installation, commissioning, operation, monitoring, troubleshooting, maintenance, repair, decommissioning, and disposal, and the appropriate tasks performed by skilled and unskilled persons.

This document provides the common and fundamental aspects serving as the binding and generic framework for prospective additional parts of this document.

This document applies to information for use whether provided as electronic or printed information products, for example:

- service information for machinery, provided as PDF file for web download for trained service technicians;
- information for operation of software, provided electronically with the software as an online help;
- troubleshooting information for an operator, on a machine's on-screen display;
- functional description of a medical device on a website;
- information for assembly, printed and provided in the packaging of a piece of furniture for consumers;
- printed information for maintenance for an automatic coffee machine;

- installation planning information for a safety sensor, downloadable from a website for mechanical engineers;
- product tutorial as a web-based training aid;
- materials for product on-site training; and
- label for transportation personnel, printed on the packaging of a heavy containment vessel.

This document is intended for use by all parties responsible for or involved in the conceptualization, creation, maintenance, translation, localization, integration of content, production, provision and evaluation, acquisition and supply of information for use.

The parties concerned with information for use include the following:

- acquirers and suppliers of products;
- managers with process or product responsibilities;
- content owners and content creators such as technical writers, information developers, and illustrators;
- technical translators, localization and terminology experts; and
- authorities, agencies and authorized experts.

The aim of this document is to provide these parties with the common and fundamental basis for developing information for use of supported products of the required quality.

This document is intended to be applied and referenced in product-specific standards, including those that specify the content of information for use of those products, for example, IEC 60335 for all parts for household electrical products, ISO 20607* for machinery, and ISO/IEC 26514 for systems and software. It is intended as a basis to elaborate product-specific requirements for target audiences or product information.

* Under preparation. Stage at the time of publication: ISO/DIS 20607:2018.

This horizontal standard is primarily intended for use by technical committees in the preparation of standards in accordance with the principles laid down in IEC Guide 108.

One of the responsibilities of a technical committee is, wherever applicable, to make use of horizontal standards in the preparation of its publications. The contents of this horizontal standard will not apply unless specifically referred to or included in the relevant publications.

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 60417, *Graphical symbols for use on equipment* (available at <http://www.graphical-symbols.info/equipment>)

IEC 60617, *Graphical symbols for diagrams* (available at <http://std.iec.ch/iec60617>)

IEC 60825-1, *Safety of laser products – Part 1: Equipment classification and requirements*

ISO 3864 (all parts), *Graphical symbols – Safety colours and safety signs*

ISO 5807, *Information processing – Documentation symbols and conventions for data, program and system flowcharts, program network charts and system resources charts*

ISO 7000, *Graphical symbols for use on equipment* (available at <http://www.graphical-symbols.info/equipment>)

ISO 7010:2011, *Graphical symbols – Safety colours and safety signs – Registered safety signs*

ISO 9241-300, *Ergonomics of human-system interaction – Part 300: Introduction to electronic visual display requirements*

ISO 14617 (all parts), *Graphical symbols for diagrams*

3 Terms and definitions

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

IEC, ISO, and IEEE maintain terminological databases for use in standardization at the following addresses:

- IEC Electropedia: available at <http://www.electropedia.org/>
- ISO Online browsing platform: available at <http://www.iso.org/obp>
- IEEE Standards Dictionary Online: available at <http://ieeexplore.ieee.org/xpls/dictionary.jsp>

3.1

accessibility

extent to which products, systems, services, environments, and facilities can be used by people from a population with the widest range of user needs, characteristics, and capabilities to achieve identified goals in identified contexts of use

Note 1 to entry: Context of use includes direct use or use supported by assistive technologies.

[SOURCE: ISO 9241-940:2017, 3.1]

3.2

commissioning

procedures prior, or related, to the handing over of a product ready to be placed into service

Note 1 to entry: Commissioning may include final acceptance testing, the handing over of relevant documentation for the supported product or instructing personnel.

3.3

competent person

person who has acquired through training, qualifications or experience, or a combination of these, the knowledge and skills enabling that person to perform a specified task

Note 1 to entry: This document uses the term competent person in the context of the creation of the information for use and information management. See also definition 3.36, skilled person.

[SOURCE: ISO 17842-1:2015, 3.6, modified – Note 1 to entry added.]

3.4

component

product used as a constituent in an assembled product, system or plant

[SOURCE: IEC 81346-1:2009, 3.7]