

Technical manuals —

Part 2: Guide to content

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- Institute of Scientific and Technical Communicators
- Library Association
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- Periodical Publishers' Association
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- Defence Manufacturers' Association
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- Institution of Incorporated Executive Engineers
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- Society of Authors

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Foreword

This Part of BS 4884 has been prepared under the direction of the Information and Documentation Standards Policy Committee. BS 4884 has been revised and now comprises:

- *Part 1: Specification for presentation of essential information;*
- *Part 2: Guide to content;*
- *Part 3: Guide to presentation.*

Part 2 applies to the selection and arrangement of information to be included in technical manuals. Although its recommendations are essential to the production of good technical manuals, it is presented in the form of guidance because some of the recommendations require subjective judgement and some will not apply to every manual. It should be read in conjunction with the revision of BS 4884-1:1992 and the new BS 4884-3:1993, which is a revision of BS 4884-2:1974.

BS 4884 is a general standard. It has been prepared to help those who:

- a) produce technical manuals;
- b) prepare detailed standards for technical manuals for a particular industry, e.g. BS 7649, which gives guidance on the design and preparation of user documentation for software products;
- c) prepare specifications for technical manuals for particular products.

Anyone who acquires a product generally needs information on the correct way to use it. A good technical manual will provide users of the product with the information that they need in a form that they can understand. The form and content of the manual will depend on the complexity of the product and the circumstances in which it is supplied and used.

Technical manuals vary in scale from the full documentation necessary for the operation and maintenance of a large industrial complex to the instructions supplied with a domestic appliance, such as a washing machine, or the information supplied with a consumable commodity, such as a tin of paint. They vary in form from the traditional hard copy to computer-based presentation, designed to be viewed on screen.

A technical manual is often essential to the safe and proper use of the product it accompanies and is itself an essential part of the product. Its provision is generally specified in contracts. It requires as much care in preparation as any other part of the product.

The committee that drafted BS 4884 is aware that no single set of rules can provide the producers of technical manuals with solutions to all the problems of designing and writing a technical manual. The form and content vary so much that the essential information that applies to every manual is limited. This information is specified in Part 1. Parts 2 and 3 give guidance on the selection, arrangement and presentation of information, that will, it is hoped, help users of the standard to find solutions appropriate to their needs.

Users of this Part of BS 4884 are reminded that legislation applies to technical manuals. Some products and the instructions for their use are subject to statutory regulations that may include special requirements for health and safety. In Particular, attention is drawn to the Consumer Protection Act 1987 [1] and the Health and Safety at Work etc. Act 1974 [2].

A British Standard does not purport to include all the necessary provisions of a contract. Users of British Standards are responsible for their correct application.

Compliance with a British Standard does not of itself confer immunity from legal obligations.

Summary of pages

This document comprises a front cover, an inside front cover, pages i to iv, pages 1 to 18, an inside back cover and a back cover.

This standard has been updated (see copyright date) and may have had amendments incorporated. This will be indicated in the amendment table on the inside front cover.

1 Scope

This Part of BS 4884 gives guidance on the selection and arrangement of information in technical manuals. It provides detailed information about the content of the categories of information listed in BS 4884-1:1992. It applies to all technical manuals, whatever the form of presentation.

2 References

2.1 Normative references

This Part of BS 4884 incorporates, by reference, provisions from specific editions of other publications. These normative references are cited at the appropriate points in the text and the publications are listed on the inside back cover. Subsequent amendments to, or revisions of, any of these publications apply to this Part of BS 4884 only when incorporated in it by updating or revision.

2.2 Informative references

This Part of BS 4884 refers to other publications that provide information or guidance. Editions of these publications current at the time of issue of this standard are listed on the inside back cover, but reference should be made to the latest editions.

3 Definitions

For the purposes of this Part of BS 4884, the definitions given in BS 3811:1984 apply, together with the following.

3.1

caution

information that draws attention to the risk of damage to the product, process or surroundings

3.2

document

a combination of a medium and the information recorded on or in it

3.3

drill

a mandatory procedure performed by several people acting as a team

3.4

end user

a person who installs, operates, maintains or repairs the product, not necessarily its owner or purchaser

3.5

hard copy

a permanent and eye-legible version of a document, e.g. print on paper

3.6

instruction manual

a technical manual that applies to the day-to-day use, maintenance and handling of a product

3.7

product

any material or item of any complexity, from a raw material to a complete engineering system

3.8

services

externally provided services, e.g. water, gas

3.9

technical manual

a generic term for any document that explains how to use, maintain and handle a product from its delivery to its disposal, and in addition gives any technical information that a user is likely to need during the life of the product

3.10

user

a person or an organization that owns the product or has overall responsibility for it

3.11

warning

information that draws attention to the risk of injury or death

4 General

4.1 Importance of the manual

A technical manual is an essential part of a product and its provision is often a legal requirement. Its production will add something to the initial cost, the sum involved depending on the amount of information supplied and the form in which it is provided. Although this cost will eventually be passed on to the purchaser, the benefits that derive from providing adequate technical information can outweigh the additional cost of producing it.

For example, manufacturers and suppliers can benefit from the reduced risk of people misusing their products and of costs arising from legal liability in such cases, from savings in time and money spent dealing with enquiries, and from enhanced reputation and increased sales resulting from well-documented information.

Users can benefit from more efficient use of the product, from spending less time on exploratory work before using, repairing or modifying it and from the reduced incidence of injuries and faults that arise from lack of knowledge.

4.2 Advertising material

It is essential that advertising material is kept separate from technical information. If technical information is obscured by advertising material, users may be impeded in their search for essential information and become irritated.

4.3 Responsibility for production

One person should be given overall responsibility for the production of the technical manual, which should not be regarded as a minor task that can be delegated to anyone who has time to spare. It is a composite skilled task that requires special knowledge and experience. The simplest manual usually requires a technical author and illustrator. More complex manuals may require a range of specialists, such as authors, designers, illustrators, photographers and draughtsmen. The competence of technical authors, illustrators and other specialists should be checked before they are employed (see 4.5).

If many different groups of people, including specialist subcontractors and suppliers, are engaged in the design, specification and construction of a product, the client who commissions the product should order, specify and finance the production of the technical manual, even if the client will not be the end user of the product (see 5.2).

4.4 Contract for product

The contract for the supply of a product should either contain the requirement for the accompanying technical manual or have associated with it a separate contract for the technical manual. If the production of a technical manual forms part of a larger contract, the provisions that apply to the technical manual should be separate from other provisions, so that progress of work on the technical manual and its quality can be monitored.

4.5 Contract for consultant

If a person or an organization not employed by the product's manufacturer or supplier is to be contracted to provide a technical manual, those responsible for employing the contractor should ensure that the technical author entrusted with the work is competent and capable of producing a manual in accordance with the client's requirements. The author should be asked to submit examples of previous work or to prepare part of the proposed manual as a sample.

The contractor should be required to seek all necessary information about the product and the manufacturer should be required to supply it. If the product contains subsystems supplied by others, the contractor should ensure that the suppliers provide adequate technical information with the subsystems or should see that it is supplied.

4.6 Usability tests

The manual should be subjected to usability tests before it is published. If it is not feasible for manufacturers of consumer products to consult potential users, consumer organizations should be consulted, if there is no suitable organization, a panel of typical users should, if possible, be asked to check the manual's usability.

The client should be asked to arrange usability tests for a technical manual for a complex product such as a large building.

4.7 Changes in product

4.7.1 During development

Those responsible for producing the manual should be kept informed of any changes in the product as it develops. The manual should apply to the final form of the product only.

4.7.2 After release

Any changes made in the product after its initial release should be reflected in the manual. There should be provision to ensure that the manual is, if necessary, amended each time the product is modified.

5 Specification

5.1 General

Whether the requirement for a technical manual is in the main contract for a product or in a separate contract, it will require specification. Some organizations have a general specification that can be adapted to suit particular products. Some manufacturers provide a specification for the technical manual that is to be issued with a particular product. The contract should identify the specification that is to be used.

In large-scale production, the manufacturer normally prepares the specification for the manual for a product. For a complex product, e.g. a large industrial building, the user normally prepares the specification for the manual.

Clauses 6 to 16 should be used as a check-list in the preparation of the specification.