

Technical manuals —

Part 3: Guide to presentation

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The preparation of this British Standard was entrusted by the Information and Documentation Standards Policy Committee (DOT/-) to Technical Committee DOT/6, upon which the following bodies were represented:

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- London College of Printing
- Periodical Publishers’ Association
- Science Museum Library
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- Consumer Policy Committee of BSI
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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. It supersedes BS 4884-2:1974, which is withdrawn. 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 3 is designed to help anyone who is concerned with the preparation of technical manuals that will be issued as hard copy to provide information that is easy to use and well presented, in a form appropriate to the content and conditions of use. Its recommendations are essential to the production of good technical manuals. They are presented in the form of guidance because some of the recommendations require subjective judgement and some will not apply to every manual. They should be read in conjunction with the revision of BS 4884-1:1992 and the new BS 4884-2:1993.

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. see 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 the 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 16, 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 presentation of information in technical manuals. It includes detailed information about layout of text and illustrations, methods of production, methods of numbering and use of colour.

It applies to all technical manuals issued as hard copy, from multi-volume works to simple cards or labels.

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

artwork

originals from which illustrations are to be printed

3.2

as-built drawing

an illustration showing a product as actually completed

3.3

camera-ready copy

copy intended for reproduction without further preparation

3.4

caution

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

3.5

document

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

3.6

edge marks

coloured markings on the edges of pages, used to indicate the position of major divisions of the contents of a manual

3.7

electronic publishing

the use of information technology to facilitate the production of a printed document

3.8

fold-out

a leaf, usually bearing illustrative material, bound in at one edge and designed to fit the manual when folded

3.9

instruction manual

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

3.10

justification

in printing, the arrangement of characters and spaces so as to give straight edges conforming to a predetermined line length

NOTE Adjustment of a single edge is called "left justified" or "right justified". An edge not justified is called "ragged".

3.11

landscape page

a page of which the width is greater than the height when it is oriented for reading

3.12

logo

an emblem or design used by an organization as a distinctive mark

3.13

loose material

items supplied with a manual that cannot be bound in, e.g. large drawings, charts, microfiche, disks

3.14

microfiche

transparent microform, usually A6 size, with images arranged on a grid

3.15

paragraph heading

a heading on the same line as the beginning of the paragraph

3.16

portrait page

a page of which the height is greater than the width when it is oriented for reading

**3.17
preliminary pages**

matter preceding and leading up to the main body of the text

**3.18
product**

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

**3.19
running head**

text in a standard form at the top of each page, such as the document identifier

**3.20
table**

an assembly of facts, numbers, etc., systematically arranged in columns and rows

**3.21
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

**3.22
text**

that part of a document in which information is presented in verbal form, as distinct from illustrations

**3.23
throw-clear**

a leaf bearing a map, table or similar illustrative material mounted on a guard the full width of the manual so that the illustrative material when opened out may be consulted as the manual is read

**3.24
warning**

information that draws attention to the risk of injury or death

**3.25
window**

an opening cut in the cover of a manual to reveal information on the following page

4 Planning for production**4.1 Users' needs**

The structure, form and layout of every technical manual, part of a technical manual or instruction manual should be designed to meet the needs of potential users. The various users concerned may require different levels of information and different forms of presentation for the operation and maintenance of a product.

Sometimes a convenient form of presentation will be a single, comprehensive manual from which users can extract the information appropriate to their needs. For example, managers with general responsibilities should be able to find the information necessary for planning and supervision, while operators can extract operating instructions, maintenance staff can extract maintenance schedules, stores staff can extract parts lists and so on.

Sometimes several separate volumes will be issued for one product. For example, the operation and maintenance of a consumer product may require a user's handbook for the domestic user, a service manual for the roving service engineer and a workshop manual for the workshop engineer. In manuals provided for a building, information may be grouped according to area for some users and according to subject for others, e.g. complete information about the electrical circuits for maintenance engineers.

Before work begins, suppliers and manufacturers should assess the market to decide the forms of manual that will best suit their customers.

4.2 Conditions of use

The manual's form, design and materials should be decided by the conditions in which it is likely to be used. Matters to be taken into account include the following:

- a) the environment of use, e.g. exceptionally cold, hot, wet, dry or dirty;
- b) whether the user's hands will be free;
- c) whether the manual will be physically supported and, if so, how;
- d) whether the user is likely to have a physical disability or impaired vision.

4.3 Form of manual

Once the users' needs have been established, the form and structure of the manual should be decided. Forms of manual include the following:

- a) reference book;
- b) pocket book;
- c) wall chart;