



BSI Standards Publication

Preparation of information for use (instructions for use) of products

Part 1: Principles and general requirements

National foreword

This British Standard is the UK implementation of EN IEC/IEEE 82079-1:2020. It is identical to IEC/IEEE 82079-1:2019. It supersedes BS EN 82079-1:2012, which will be withdrawn on 3 April 2023.

The UK participation in its preparation was entrusted to Technical Committee GEL/3, Documentation and graphical symbols.

A list of organizations represented on this committee can be obtained on request to its secretary.

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Date	Text affected
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English Version

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products - Part 1: Principles and general requirements
(IEC/IEEE 82079-1:2019)

Élaboration des informations d'utilisation (instructions
d'utilisation) des produits - Partie 1: Principes et exigences
générales
(IEC/IEEE 82079-1:2019)

Erstellen von Gebrauchsanleitungen - Gliederung, Inhalt
und Darstellung - Teil 1: Allgemeine Grundsätze und
ausführliche Anforderungen
(IEC/IEEE 82079-1:2019)

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European Committee for Electrotechnical Standardization
Comité Européen de Normalisation Electrotechnique
Europäisches Komitee für Elektrotechnische Normung

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European foreword

This document (EN IEC/IEEE 82079-1:2020) consists of the text of IEC/IEEE 82079-1:2019 prepared by IEC/TC 3 "Information structures and elements, identification and marking principles, documentation and graphical symbols".

The following dates are fixed:

- latest date by which this document has to be implemented at national level by publication of an identical national standard or by endorsement (dop) 2020-10-03
- latest date by which the national standards conflicting with this document have to be withdrawn (dow) 2023-04-03

This document supersedes EN 82079-1:2012 and all of its amendments and corrigenda (if any).

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In the official version, for Bibliography, the following notes have to be added for the standards indicated:

IEC 60073	NOTE Harmonized as EN 60073
IEC 60204-1	NOTE Harmonized as EN 60204-1
IEC 60335 (series)	NOTE Harmonized as EN 60335 (series)
IEC 60529	NOTE Harmonized as EN 60529
IEC 60848	NOTE Harmonized as EN 60848
IEC 61082-1:2014	NOTE Harmonized as EN 61082-1:2015 (not modified).
IEC 61310-1	NOTE Harmonized as EN 61310-1
IEC 60204-1	NOTE Harmonized as EN 60204-1
IEC 61355-1:2008	NOTE Harmonized as EN 61355-1:2008 (not modified).
IEC 62023	NOTE Harmonized as EN 62023
IEC 62507-1	NOTE Harmonized as EN 62507-1
IEC 62569-1	NOTE Harmonized as EN 62569-1
IEC 62744	NOTE Harmonized as EN 62744
IEC 80416-1:2008	NOTE Harmonized as EN 80416-1:2009 (not modified).

IEC 81346-1:2009	NOTE Harmonized as EN 81346-1:2009 (not modified).
ISO 10628-1:2014	NOTE Harmonized as EN ISO 10628-1:2015
ISO 10628-2:2012	NOTE Harmonized as EN ISO 10628-2:2012
ISO 12100	NOTE Harmonized as EN ISO 12100
ISO 14971	NOTE Harmonized as EN ISO 14971
ISO 15006	NOTE Harmonized as EN ISO 15006
ISO 17100	NOTE Harmonized as EN ISO 17100
ISO 7731	NOTE Harmonized as EN ISO 7731
ISO 9000	NOTE Harmonized as EN ISO 9000
ISO 9241-210:2010	NOTE Harmonized as EN ISO 9241-210:2010

Annex ZA

(normative)

Normative references to international publications with their corresponding European publications

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.

NOTE 1 When an International Publication has been modified by common modifications, indicated by (mod), the relevant EN/HD applies.

NOTE 2 Up-to-date information on the latest versions of the European Standards listed in this annex is available here: www.cenelec.eu.

<u>Publication</u>	<u>Year</u>	<u>Title</u>	<u>EN/HD</u>	<u>Year</u>
IEC 60417	-	Graphical symbols for use on equipment	-	-
IEC 60617	-	Graphical symbols for diagrams	-	-
IEC 60825-1	-	Safety of laser products - Part 1: Equipment classification and requirements	EN 60825-1	-
ISO 3864	series	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 - Registered symbols	-	-
ISO 7010	2011	Graphical symbols - Safety colours and safety signs - Registered safety signs	EN ISO 7010	2012
ISO 9241-300	-	Ergonomics of human-system interaction – Part 300: Introduction to electronic visual display requirements	EN ISO 9241-300	-
ISO 14617	series	Graphical symbols for diagrams	-	-

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INTERNATIONAL ELECTROTECHNICAL COMMISSION

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

Part 1: Principles and general requirements

FOREWORD

- 1) The International Electrotechnical Commission (IEC) is a worldwide organization for standardization comprising all national electrotechnical committees (IEC National Committees). The object of IEC is to promote international co-operation on all questions concerning standardization in the electrical and electronic fields. To this end and in addition to other activities, IEC publishes International Standards, Technical Specifications, Technical Reports, Publicly Available Specifications (PAS) and Guides (hereafter referred to as "IEC Publication(s)"). Their preparation is entrusted to technical committees; any IEC National Committee interested in the subject dealt with may participate in this preparatory work. International, governmental and non-governmental organizations liaising with the IEC also participate in this preparation.

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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

- reconfirmed,
- withdrawn,
- replaced by a revised edition, or
- amended.

IMPORTANT – The 'colour inside' logo on the cover page of this publication indicates that it contains colours which are considered to be useful for the correct understanding of its contents. Users should therefore print this document using a colour printer.

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).

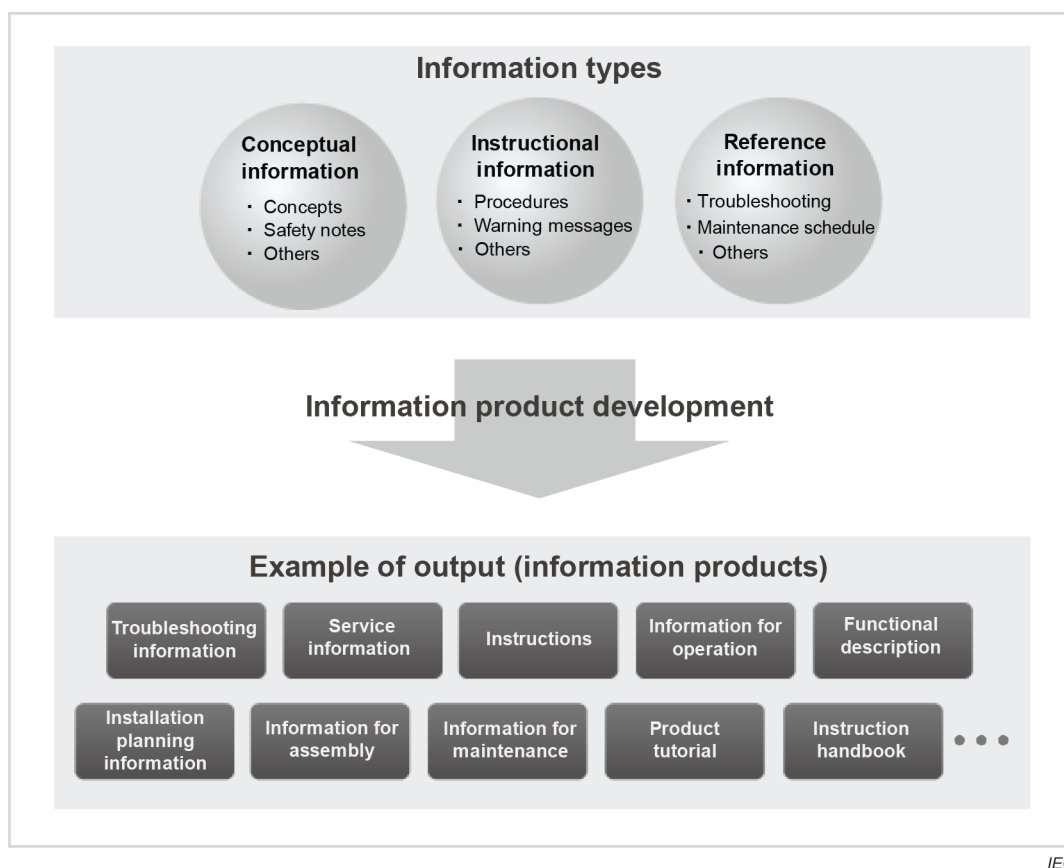


Figure 1 – Concept of information for use

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.

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]

3.5
consequence

outcome of an occurrence of a particular set of circumstances

Note 1 to entry: There can be more than one consequence from one occurrence.

Note 2 to entry: Consequences can be expressed qualitatively or quantitatively.

3.6
consumable

any part or material that is necessary to be replaced or refilled for continuous use or maintenance of the product

3.7
consumer

individual member of the general public, purchasing or using products for private purposes

Note 1 to entry: For the purpose of the requirements of this document, a "consumer" is assumed to be a non-skilled person.

3.8
consumer product

product available to, intended for or likely to be used by consumers

3.9
customer

individual or organization that purchases or receives a product

Note 1 to entry: The term "customer" includes but has a broader meaning than "consumer" (3.7).

3.10
document

fixed and structured amount of information intended for human perception that can be managed and interchanged as a unit between users and systems

[SOURCE: IEC 61082-1:2014, 3.1.1, modified – The notes have been deleted.]

3.11
documentation

collection of documents related to a given subject

[SOURCE: IEC 61082-1:2014, 3.1.3, modified – The notes have been deleted.]

3.12
equipment

associated assemblies intended to achieve a defined final objective

[SOURCE: IEC 80416-1:2008, 3.3]

3.13
graphical symbol

visually perceptible figure with a particular meaning used to transmit information independently of language

[SOURCE: IEC 80416-1:2008, 3.4]

3.14
harm

injury or damage to the health of people, or damage to property or the environment

[SOURCE: ISO/IEC Guide 51:2014, 3.1]

3.15

hazard

potential source of harm

[SOURCE: ISO/IEC Guide 51:2014, 3.2]

3.16

illustration

visually perceptible figure, artificially created to transmit specific information, excluding safety signs and graphical symbols

EXAMPLE Graphical image, picture, figure, photograph, line drawing, table.

3.17

information for use

instructions for use

information provided by the supplier that provides the target audience with concepts, procedures and reference material for the safe, effective, and efficient use of a supported product during its life cycle

EXAMPLE Step-by-step instructions, troubleshooting information, service information, operation and maintenance instructions, and assembly instructions.

Note 1 to entry: "Instructions for use, procedures for the safe, effective, and efficient use of a supported product", was the term formerly used to include all the content defined as part of information for use.

Note 2 to entry: Excludes supplementary information, which is outside the scope of information for use.

3.18

information model

representation of concepts, relationships and rules for a body of information

3.19

information product

information item

separately identifiable body of information that is produced, stored, and delivered for human use

Note 1 to entry: A document produced to meet information requirements can be an information product, or part of an information product, or a combination of several information products.

Note 2 to entry: An information product can be produced in several versions during a project or system life cycle.

[SOURCE: ISO/IEC/IEEE 15289:2017, 3.1.13, modified – "information product" has been added as a first preferred term and in the notes "information item" has been replaced with "information product".]

3.20

information quality

degree to which an information product satisfies the stated and implied needs when used under specified conditions

3.21

intended use

exhaustive range of functions or foreseen applications defined and designed by the supplier of the product

Note 1 to entry: Functions or applications not listed by the supplier are excluded from the intended use of the product.

Note 2 to entry: Additional or modified functions or applications resulting from modifications not sanctioned by the supplier of the product are excluded from the intended use.

3.22

label

item, attached to a product (if practicable) or its packaging, which displays information related to one or more characteristic(s) of the product

[SOURCE: ISO/IEC Guide 14:2018, 3.10, modified – changed "consumer product" to "product".]

3.23

maintenance

actions intended to retain a product in, or restore it to, a useful and safe condition, in which it can perform the intended use

3.24

marking

symbols, pictograms, warnings, logos or inscriptions on the product, label, or packaging to identify its type, which can also include short textual messages

[SOURCE: ISO/IEC Guide 14:2018, 3.12, modified – changed "consumer product" to "product".]

3.25

minimalism

principle that information for use includes critical information and the least amount of other information needed to be complete

3.26

personal protective equipment

any device or appliance designed to be worn or held by an individual for protection against one or more health and safety hazards

[SOURCE: IEC 60050-651:2014, 651-23-01, modified – The abbreviated term "PPE", the wording "whilst performing live working" and Note 1 to entry have been deleted.]

3.27

plant

assembly of different systems on a specific site

[SOURCE: IEC 61355-1:2008, 3.10]

3.28

product

intended or accomplished result of labour, or of a natural or artificial process

Note 1 to entry: Information for use is seen as a part of a product.

Note 2 to entry: A product can be a system, a service, goods, information, or a combination thereof.

3.29

product safety label

label on a product that informs of one or more potential hazards and describes the safety precautions and/or actions required to avoid the hazard(s)

[SOURCE: ISO 3864-2:2016, 3.9, modified – "the observer" has been deleted and Note 1 to entry has been deleted.]