



GUIDE 37

Instructions for use of products of consumer interest

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Documents

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Foreword

ISO (the International Organization for Standardization) and IEC (the International Electrotechnical Commission) form a specialized system for worldwide standardization. National bodies that are members of ISO or IEC participate in the development of International Standards through technical committees established by the respective organization to deal with particular fields of technical activity. ISO and IEC technical committees collaborate in fields of mutual interest. Other international organizations, governmental and non-governmental, in liaison with ISO and IEC, also take part in the work.

ISO/IEC Guide 37 has been drawn up by the ISO Committee on Consumer Policy (COPOLCO). The document was approved by IEC national committees and ISO member bodies.

This second edition cancels and replaces the first edition (ISO/IEC Guide 37:1983).

Annex A of this Guide is for information only.

Introduction

0.1 Instructions for use are the means of conveying information to the user on how to use the product in a correct and safe manner. As means of communication, texts, words, signs, symbols, diagrams, illustrations and audible or visible information are used, separately or in combination. They may be on the product itself or its packaging or in accompanying materials, for example, leaflets, manuals, audio and video tapes, and computerized information.

0.2 A general guide cannot provide comprehensive information covering each case. This Guide, therefore, offers guidance to all interested parties in the form of general principles and detailed recommendations on the design and formulation of all types of instructions necessary or helpful to the final user of consumer products. Practical recommendations for the assessment of such instructions are included in an informative annex.

0.3 This Guide may be used in conjunction with the requirements of specific product standards, or where no such standards exist, with the relevant requirements of standards for similar products.

Instructions for use of products of consumer interest

1 Scope

1.1 This Guide establishes the principles and gives recommendations on the design and formulation of instructions for use of products of consumer interest. It is intended for

- product designers, manufacturers, technical writers or other people engaged in the work of conceiving and drafting such instructions;
- committees preparing standards for consumer products.

1.2 The principles and detailed recommendations in this Guide should apply in combination with the specific requirements on instructions for use laid down in standards for specific products or groups of products.

1.3 Assessment of the quality of instructions for use should follow common criteria. This Guide therefore has an informative annex (annex A) containing some practical recommendations and a proposed methodology for assessment. The annex is addressed primarily to researchers and experts engaged in such assessment work; it may also be helpful to the Guide's principal target groups named in 1.1.

2 References

ISO 3864:1984, *Safety colours and safety signs*.

ISO 7000:1989, *Graphical symbols for use on equipment — Index and synopsis*.

ISO 7001:1990 and Amendment 1:1993, *Public information symbols*.

ISO 11683:1993, *Packaging — Tactile danger warnings — Requirements*.

IEC 417:1973 (and supplements), *Graphical symbols for use on equipment — Index, survey and compilation of the single sheets*.

ISO/IEC Directives, part 2:1992, *Methodology for the development of International Standards*.

ISO/IEC Guide 14:1977, *Product information for consumers*.

ISO/IEC Guide 50:1987, *Child safety and standards — General guidelines*.

ISO/IEC Guide 51:1990, *Guidelines for the inclusion of safety aspects in standards*.

ISO/IEC Guide 52:1990, *Glossary of fire terms and definitions*.

3 General principles

3.1 Instructions for use are an integral part of the delivery of the product. They should also reduce the risk of damage to the product and consequent malfunction or inefficient operation.

3.2 Instructions for use should allow and promote correct use of a product and should directly help to avoid misuse which may lead to hazards. Instructions for use cannot and should not compensate for design deficiencies¹⁾.

3.3 Instructions for use should

- a) clearly identify the product;
- b) recognize the type of user, and his/her capabilities;
- c) define, if necessary, the intended use of the product²⁾;
- d) contain all information required for correct and safe use of the product and/or for service and maintenance.

1) For general principles of preferences of risk reduction, see ISO/IEC Guide 51:1990, clause 5.

2) For definitions of "intended use" and "reasonably foreseeable misuse", see ISO/IEC Guide 51:1990, 3.7 and 3.8.

3.4 Instructions for use should cover reasonably foreseeable misuse of the product, and adequate warning should be given (see ISO/IEC Guide 51:1990, 6.4.4). In most countries the manufacturer/producer has a legal obligation to include such warnings.

3.5 Instructions for use should cover information, separately or in combination, as far as it is relevant, on

- a) function and operation;
- b) transport, assembly, installation;
- c) cleaning, maintenance, fault diagnosis, repair;
- d) destruction/disposal of the product and/or any waste materials with due regard to safety and environmental considerations.

3.6 Instructions for use should convey important messages to the user about aspects of use related to

- the environment (for example, appropriate dosage of detergent for a washing machine, destruction/disposal of waste, recycling);
- conservation of energy and other resources.

3.7 Attention should be drawn to the need for special protective measures, such as adult supervision or the wearing of special clothing, needed to protect users and bystanders. Dangers to particular groups such as children (see ISO/IEC Guide 50:1987), elderly people and disabled people should be borne in mind.

3.8 If some of the instructions are directed only to a specific group of users (for example for installation, repair or certain kinds of maintenance), those instructions should be given separately and be adequately marked. In some cases they need not accompany the product (see also 7.12).

3.9 For products which have a limited safe or effective life, clear information should be provided on the year of manufacture and/or on the date of expiry.

3.10 The date of publication of the instructions for use should be given.

3.11 Instructions for use should be consistent with all other material about the same product issued by the manufacturer/producer such as advertising or packaging.

4 Clauses in standards

4.1 Standards for products of consumer interest should specify, for instance in the form of a minimum

list, the matters which need to be covered in the instructions for use. This should be a separate section of the product standard, normally entitled "Instructions for use, including installation and maintenance" (for safety standards see ISO/IEC Guide 51:1990, 6.4.6).

4.2 Where specific procedures are necessary for safe use, operation, assembly, disassembly, cleaning or maintenance of the product, or similarly for its destruction/disposal, or disposal of waste materials, they should be specified in the product standard (see ISO/IEC Directives, Part 2:1992, subclause 8.3).

4.3 Where instructions for use are to be given on the product itself, they should be specified in the section dealing with marking and labelling (see ISO/IEC Guide 51:1990, clause 5; ISO/IEC Directives, Part 2:1992, subclause 8.2; and clauses 8 and 9 below).

5 Location and nature

5.1 Depending on one or more of the following elements:

- the risks (see ISO/IEC Guide 51:1990, 3.2);
- environmental or similar requirements;
- the product design;
- when the information is needed by the user,

it should be decided whether the instructions for use — or parts of them, and if so which parts — are to be given in one or more of the following ways:

- on the product;
- on the packaging;
- in accompanying material.

In addition, it should be decided what means of communication should be used in each case (see 0.1).

NOTE 1 Placing of instructions on the product itself has clear advantages in convenience for the user. But for some products, because of their small size or their shape, or the fact that they are partially obscured from view during use, placing some or all of the instructions on packaging or in accompanying materials may be the best or only solution.

5.2 Where instructions for use are complex, it may be helpful if certain important messages are given or displayed on the product by means of short reference or reminder cards, stickers or labels (see clause 11).