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

Part 1:
Principles and general requirements

Élaboration des informations d'utilisation (instructions d'utilisation) des produits —

Partie 1: Principes et exigences générales

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This draft is submitted to a parallel vote in ISO and in IEC.

Reference number
IEC/IEEE FDIS 82079-1:2018(E)

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INTERNATIONAL ELECTROTECHNICAL COMMISSION

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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[1], 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.

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/XX/FDIS	3/XX/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.

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1 A list of IEEE participants can be found at the following URL: (to be provided prior to publication).

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).

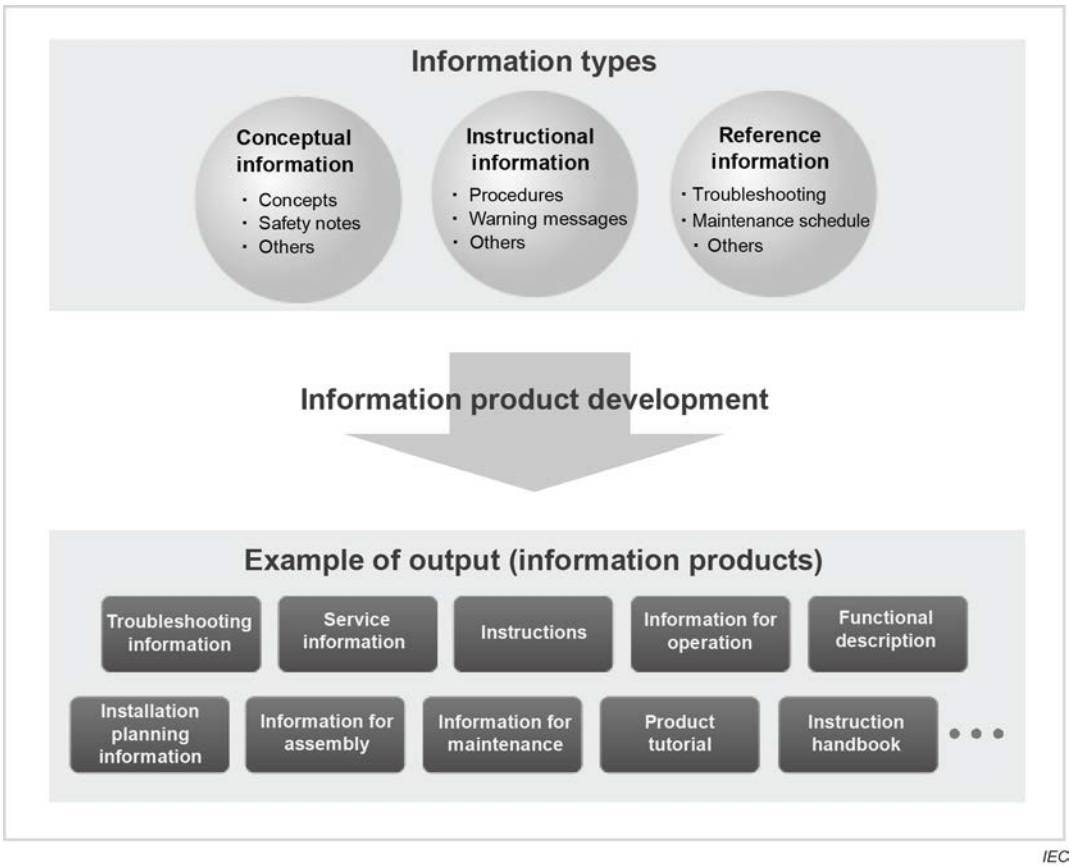

Figure 1 – Concept of information for use

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.

The National Committees are requested to note that for this publication the status of a horizontal standard in accordance with IEC Guide 108 is envisaged, pending previous approval of the Standardization Management Board of IEC (IEC SMB).

THIS TEXT IS INCLUDED FOR THE INFORMATION OF THE NATIONAL COMMITTEES AND WILL BE DELETED AT THE PUBLICATION STAGE.

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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.

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 the 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.]

3.30
reasonably foreseeable misuse
use of a product or system in a way not intended by the supplier, but which can result from readily predictable human behaviour

Note 1 to entry: Readily predictable human behaviour includes the behaviour of all types of users. For more information, see ISO 10377.

[SOURCE: ISO/IEC Guide 51:2014, 3.7, modified – The wording "e.g. the elderly, children and persons with disabilities" has been deleted from Note 1 to entry. Note 2 to entry has been deleted.]

3.31
repair
corrective maintenance of defective or damaged parts or functions of a product

3.32
risk
combination of the probability of occurrence of harm and the severity of that harm

Note 1 to entry: The probability of occurrence includes the exposure to a hazardous situation, the occurrence of a hazardous event and the possibility to avoid or limit the harm.

[SOURCE: ISO/IEC Guide 51:2014, 3.9]

3.33
safety note
safety-related information that is collected or grouped in a document or section of a document in a meaningful organizational system to explain safety measures, raise safety awareness, and provide a basis for safety-related training of persons

3.34
safety sign
sign giving a general safety message, obtained by a combination of colour and geometric shape and which, by the addition of a graphical symbol, gives a particular safety message

[SOURCE: ISO 7010:2011, 3.3]

3.35
self-assembly product
flatpack product
ready-to-assemble product
product that is intended to be assembled or erected from separate components without the help of a supervisor or trainer and relying only on step-by-step instructions

Note 1 to entry: This includes both products supplied in the form of a kit of component parts and products that incorporate structural elements requiring folding, locking or tensioning (e.g. child pushchairs or camping equipment).

3.36
skilled person
individual with relevant technical education, training, or experience to enable perceiving risks and avoiding hazards occurring during use of a product

3.37
step
one element in a procedure that tells the target audience to perform an action

Note 1 to entry: A step is presented as a numbered list item.

3.38
step-by-step instructions
procedure consisting of steps to be followed for the safe, effective, and efficient use of a supported product

3.39
supplier
individual or organization that provides products

Note 1 to entry: "Supplier" includes producer, manufacturer, integrator, vendor, distributor, retailer, agency, provider of information or their authorized representatives.

3.40
supported product
product to which the information for use relates

3.41
system
set of interrelated elements considered in a defined context as a whole and separated from their environment

[SOURCE: IEC 60050-151:2001, 151-11-27, modified – The notes have been deleted.]

3.42
target audience
group of persons for whom information for use is intended by the supplier

3.43
topic
coherent part of an information product with a heading that deals with a single subject

Note 1 to entry: In a printed document a topic is a section or subsection. In online documentation, a topic usually is the amount of information invoked by navigation (e.g. following a link) and completely accessible by scrolling.

3.44
usability
extent to which a product can be used by specified users to achieve specified goals with effectiveness, efficiency, and satisfaction in a specified context of use

[SOURCE: ISO 9241-210:2010, 2.13 modified – "system or service" have been deleted.]

3.45
use
activity that the user may perform with or on the product during its whole life cycle

Note 1 to entry: "Use" covers the intended use and the reasonably foreseeable misuse in normal and reasonably foreseeable conditions of use.

3.46
use case
description of behavioural requirements of a system and its interaction with a user

[SOURCE: ISO/IEC/IEEE 26515:2011, 4.15]

3.47
user
person who interacts with the product

Note 1 to entry: "User" can include persons who install, operate, service, maintain, or dispose of the product.

3.48
warning message
safety-related information that warns about hazards and instructs on how to avoid them

Note 1 to entry: Warning messages are normally given within step-by-step instructions related to hazardous tasks.

4 Fulfilment of requirements for information for use

4.1 General

The fulfilment of specified requirements in this document does not release suppliers from their obligations to assess the legal framework for product compliance within each separate distribution area. Inadequate product-related information can result in product safety and liability risks.

The requirements of this document are of two kinds:

a) requirements for information for use supporting a particular product in 5.2, 5.3, Clause 7, Clause 8 and Clause 9; and

b) requirements for information management processes in 5.4, Clause 6, and Clause 10.

A claim of fulfilment of requirements for information for use of a particular consumer product shall only be made by a supplier if the information products supplied (including information products supplied electronically) to support the product fulfil the requirements in a).

Claims of fulfilment of requirements other than for information for use supporting a consumer product shall only be made by a supplier if:

1) the processes established by an organization to prepare information for use fulfil b); or

2) the information for use supplied to support a particular product fulfil a).

A supplier may claim fulfilment of requirements for both the information for use supporting a particular product (a)) and for the information management process (b)).

Annex A provides guidance on evaluation.

4.2 Evaluation of information for use of consumer products

Evaluation of information for use of a consumer product should include an empirical effectiveness check. The empirical effectiveness check should involve not only skilled experts but also persons unfamiliar with the use of the supported product and its information for use. Where practicable, the supported product and preferably packaging should be available for the evaluation. This should be practicable for consumer products.

Annex A describes several methods for empirical effectiveness checks of information products.

4.3 Documentary evidence of evaluation

Where fulfillment of requirements in this document is claimed, the supplier shall retain records of the following:

a) the information for use and any packaging that were submitted for the evaluation;

b) the language version of the information for use which was assessed and approved as fulfilling the requirements in this document;

c) whether the product sample was supplied fully assembled or was assembled as part of the assessment of the information for use; and