

BS EN 82079-1:2012



BSI Standards Publication

# Preparation of instructions for use — Structuring, content and presentation

Part 1: General principles and detailed requirements

NO COPYING WITHOUT BSI PERMISSION EXCEPT AS PERMITTED BY COPYRIGHT LAW

*raising standards worldwide™*



**National foreword**

This British Standard is the UK implementation of EN 82079-1:2012. It supersedes BS 4884-1:1992, BS 4884-2:1993, BS 4884-3:1993 and BS EN 62079:2001 which are withdrawn.

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.

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

© The British Standards Institution 2012.  
Published by BSI Standards Limited 2012

ISBN 978 0 580 61751 5

ICS 01.110

**Compliance with a British Standard cannot confer immunity from legal obligations.**

This British Standard was published under the authority of the Standards Policy and Strategy Committee on 31 October 2012.

**Amendments issued since publication**

Date	Text affected
------	---------------

---

English version

**Preparation of instructions for use -  
 Structuring, content and presentation -  
 Part 1: General principles and detailed requirements  
 (IEC 82079-1:2012)**

Etablissement des instructions d'utilisation  
 -  
 Structure, contenu et présentation -  
 Partie 1: Principes généraux et exigences  
 détaillées  
 (CEI 82079-1:2012)

Erstellen von Gebrauchsanleitungen -  
 Gliederung, Inhalt und Darstellung -  
 Teil 1: Allgemeine Grundsätze und  
 ausführliche Anforderungen  
 (IEC 82079-1:2012)

This European Standard was approved by CENELEC on 2012-09-12. CENELEC members are bound to comply with the CEN/CENELEC Internal Regulations which stipulate the conditions for giving this European Standard the status of a national standard without any alteration.

Up-to-date lists and bibliographical references concerning such national standards may be obtained on application to the CEN-CENELEC Management Centre or to any CENELEC member.

This European Standard exists in three official versions (English, French, German). A version in any other language made by translation under the responsibility of a CENELEC member into its own language and notified to the CEN-CENELEC Management Centre has the same status as the official versions.

CENELEC members are the national electrotechnical committees of Austria, Belgium, Bulgaria, Croatia, Cyprus, the Czech Republic, Denmark, Estonia, Finland, Former Yugoslav Republic of Macedonia, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and the United Kingdom.

**CENELEC**

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

**Management Centre: Avenue Marnix 17, B - 1000 Brussels**

## Foreword

The text of document 3/1093/FDIS, future edition 1 of IEC 82079-1, prepared by IEC/TC 3 "Information structures, documentation and graphical symbols" was submitted to the IEC-CENELEC parallel vote and approved by CENELEC as EN 82079-1:2012.

The following dates are fixed:

- latest date by which the document has to be implemented at national level by publication of an identical national standard or by endorsement (dop) 2013-06-12
- latest date by which the national standards conflicting with the document have to be withdrawn (dow) 2015-09-12

This document supersedes EN 62079:2001.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. CENELEC [and/or CEN] shall not be held responsible for identifying any or all such patent rights.

## Endorsement notice

The text of the International Standard IEC 82079-1:2012 was approved by CENELEC as a European Standard without any modification.

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 60848	NOTE Harmonized as EN 60848.
IEC 61082-1:2006	NOTE Harmonized as EN 61082-1:2006 (not modified).
IEC 61310-1	NOTE Harmonized as EN 61310-1.
IEC 61355-1:2008	NOTE Harmonized as EN 61355-1:2008 (not modified).
IEC 80416-1:2008	NOTE Harmonized as EN 80416-1:2009 (not modified).
IEC 81346-1	NOTE Harmonized as EN 81346-1.
ISO 9000:2005	NOTE Harmonized as EN ISO 9000:2005 (not modified).
ISO 10628	NOTE Harmonized as EN ISO 10628.
ISO 15006	NOTE Harmonized as EN ISO 15006.

## Annex ZA (normative)

### Normative references to international publications with their corresponding European publications

The following documents, in whole or in part, are normatively referenced in this document and are indispensable for its application. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

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

<u>Publication</u>	<u>Year</u>	<u>Title</u>	<u>EN/HD</u>	<u>Year</u>
IEC 60204-1 (mod)	2005	Safety of machinery - Electrical equipment of machines - Part 1: General requirements	EN 60204-1 + corr. February	2006 2010
IEC 60417	Data base	Graphical symbols for use on equipment	-	-
IEC 60529	-	Degrees of protection provided by enclosures - (IP Code)	-	-
IEC 60617	Data base	Graphical symbols for diagrams	-	-
IEC 62507-1	-	Identification systems enabling unambiguous information interchange - Requirements - Part 1: Principles and methods	EN 62507-1	-
IEC/PAS 62569-1	2009	Generic specification of information on products - Part 1: Principles and methods	-	-
ISO/IEC Guide 51	1999	Safety aspects - Guidelines for their inclusion in standards	-	-
ISO/IEC Guide 71	2001	Guidelines for standards developers to address the needs of older persons and persons with disabilities	-	-
ISO 3864	Series	Graphical symbols - Safety colours and safety signs	-	-
ISO 3864-2	-	Graphical symbols - Safety colours and safety signs - Part 2: Design principles for product safety labels	-	-
ISO 7000	-	Graphical symbols for use on equipment - Index and synopsis	-	-
ISO 7010	-	Graphical symbols - Safety colours and safety signs - Registered safety signs	EN ISO 7010	-
ISO 9241	Series	Ergonomic requirements for office work with visual display terminals (VDTs)	EN ISO 9241	Series
ISO 11683	-	Packaging - Tactile warnings of danger - Requirements	EN ISO 11683	-
ISO 12100	-	Safety of machinery - General principles for design - Risk assessment and risk reduction	EN ISO 12100	-
ISO 14617	Series	Graphical symbols for diagrams	-	-

## CONTENTS

FOREWORD .....	6
1 Scope .....	8
2 Normative references .....	8
3 Terms and definitions .....	9
4 Principles .....	14
4.1 Provision of instructions for use .....	14
4.1.1 General .....	14
4.1.2 Instructions for use are part of the product .....	14
4.1.3 Consistency of information .....	14
4.1.4 Product warranty .....	14
4.1.5 Information provided after sale of products .....	14
4.1.6 Security aspects .....	15
4.2 Quality of communication .....	15
4.3 Minimizing risks .....	15
4.4 Target group(s) .....	15
4.5 Special precautions .....	16
4.6 Short-life products .....	16
4.7 Considerations to the nature of instructions for use .....	16
4.7.1 General .....	16
4.7.2 Location .....	16
4.7.3 Means of communication and media .....	16
4.7.4 Durability .....	17
4.7.5 Availability .....	17
4.7.6 Electronic guidance systems .....	17
4.7.7 User training .....	18
4.8 Creating instructions for use .....	18
4.8.1 Conformity with the product .....	18
4.8.2 Consideration of needs of target groups .....	19
4.8.3 Languages .....	20
5 Content of instructions for use .....	21
5.1 General .....	21
5.2 Identification of instructions for use .....	21
5.3 Identification of the product .....	21
5.4 Modification of products .....	22
5.5 Safety-related information .....	22
5.5.1 General .....	22
5.5.2 Safety notes .....	23
5.5.3 Warning messages .....	23
5.5.4 Safety-related information for industrial plants .....	24
5.5.5 Safety related information in quick-start guides .....	24
5.6 Product compliance .....	24
5.7 Importance of retaining instructions for use .....	24
5.8 Preparing products for use .....	24
5.8.1 Transportation and storage .....	24
5.8.2 Installation .....	24

5.8.3	Commissioning .....	25
5.9	Operation of products .....	25
5.9.1	General .....	25
5.9.2	Normal operation .....	25
5.9.3	Additional information for automatic and remotely controlled products .....	25
5.9.4	Indications of faults and warning device signals.....	26
5.9.5	Exceptional/emergency situations.....	26
5.9.6	Troubleshooting and repair by non-skilled persons .....	26
5.9.7	Troubleshooting and repair by skilled persons .....	26
5.10	Maintenance of the product .....	27
5.10.1	General .....	27
5.10.2	Product maintenance by non-skilled persons .....	27
5.10.3	Product maintenance by skilled persons .....	27
5.10.4	Planned maintenance of industrial plants.....	28
5.11	Supplied accessories, consumables and spare parts .....	28
5.11.1	Accessories .....	28
5.11.2	Consumables.....	28
5.11.3	Spare/replacement parts .....	28
5.12	Information on special tools, equipment and materials.....	29
5.13	Information on repair of products and replacement of parts .....	29
5.13.1	Information on repair of products and replacement of parts by non-skilled persons .....	29
5.13.2	Information on repair of products and replacement of parts by skilled persons .....	29
5.14	Information required when the product is no longer needed.....	29
5.14.1	General .....	29
5.14.2	Disassembly .....	29
5.14.3	Recycling .....	30
5.14.4	Disposal .....	30
5.15	Structure of instruction for use .....	30
5.15.1	General .....	30
5.15.2	Page numbering .....	30
5.15.3	Table of contents.....	30
5.15.4	Index .....	30
5.15.5	Technical terms, acronyms and abbreviations.....	30
5.15.6	Graphical and tactile symbols and tactile dots .....	31
5.15.7	Presentational conventions.....	31
5.15.8	User controls and indicators .....	31
6	Presentation of instructions for use .....	31
6.1	Comprehensibility.....	31
6.1.1	Recognized communication principles .....	31
6.1.2	Style guide .....	31
6.1.3	Structure .....	32
6.1.4	Consistent terminology .....	32
6.1.5	Simple and brief .....	32
6.1.6	One sentence, one command .....	32
6.1.7	Rules for simple wording .....	32
6.1.8	Standardized safety signs and graphical symbols .....	33
6.1.9	Ergonomic principles .....	33

6.1.10	Keeping the attention of the readers .....	33
6.1.11	Proof reading.....	33
6.2	Legibility.....	34
6.2.1	Text font sizes and graphical symbol heights .....	34
6.2.2	Maximum brightness contrast .....	36
6.2.3	Legibility standards.....	36
6.2.4	Layout .....	36
6.2.5	Instructions for use on surfaces of products or packaging.....	37
6.3	Illustrations and supporting text.....	37
6.3.1	Quality.....	37
6.3.2	Following a sequence of operations.....	37
6.3.3	Illustration with captions .....	37
6.3.4	One illustration, one item of information.....	38
6.4	Graphical symbols, including safety signs .....	38
6.4.1	Graphical symbols for use on equipment, including safety signs .....	38
6.4.2	Explanation of graphical symbols.....	38
6.4.3	Graphical symbols for diagrams.....	38
6.4.4	Minimum sizes of graphical symbols .....	38
6.5	Use of tables .....	38
6.6	Use of appropriate document types .....	38
6.7	Use of electronic media .....	39
6.7.1	General .....	39
6.7.2	Didactic requirements.....	39
6.7.3	Requirements for downloadable instructions for use .....	40
6.7.4	Requirements for user interaction .....	40
6.8	Making safety-related information prominent and conspicuous .....	41
6.8.1	Making text conspicuous .....	41
6.8.2	Making illustrations conspicuous .....	41
6.8.3	Design and placement of warning messages .....	41
6.8.4	Permanence and visibility .....	41
6.8.5	Making warning messages prominent .....	41
6.8.6	Signal words.....	41
6.9	Colours .....	42
6.9.1	Consistency.....	42
6.9.2	Colour perception considerations.....	42
6.9.3	Photocopying/printing considerations.....	42
7	Evaluation of conformity to this part of the 82079 series .....	42
7.1	Claiming conformity to this part of the 82079 series.....	42
7.2	Documentary evidence of evaluation .....	43
Annex A	(normative) Evaluation of instructions for use .....	44
Annex B	(informative) Checklist for conformity and comments .....	45
Annex C	(informative) Checklist for communication effectiveness .....	48
Annex D	(informative) Planning the preparation of instructions for use.....	51
Annex E	(informative) Empirical methods supporting the preparation of instructions for use .....	55
Bibliography	.....	58



Table 1 – Writing style examples .....	33
Table 2 – Minimum recommended text font sizes and graphical symbol heights .....	35

## INTERNATIONAL ELECTROTECHNICAL COMMISSION

---

**PREPARATION OF INSTRUCTIONS FOR USE –  
STRUCTURING, CONTENT AND PRESENTATION –**
**Part 1: General principles and detailed 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. IEC collaborates closely with the International Organization for Standardization (ISO) in accordance with conditions determined by agreement between the two organizations.
- 2) The formal decisions or agreements of IEC on technical matters express, as nearly as possible, an international consensus of opinion on the relevant subjects since each technical committee has representation from all interested IEC National Committees.
- 3) IEC Publications have the form of recommendations for international use and are accepted by IEC National Committees in that sense. While all reasonable efforts are made to ensure that the technical content of IEC Publications is accurate, IEC cannot be held responsible for the way in which they are used or for any misinterpretation by any end user.
- 4) In order to promote international uniformity, IEC National Committees undertake to apply IEC Publications transparently to the maximum extent possible in their national and regional publications. Any divergence between any IEC Publication and the corresponding national or regional publication shall be clearly indicated in the latter.
- 5) IEC itself does not provide any attestation of conformity. Independent certification bodies provide conformity assessment services and, in some areas, access to IEC marks of conformity. IEC is not responsible for any services carried out by independent certification bodies.
- 6) All users should ensure that they have the latest edition of this publication.
- 7) No liability shall attach to IEC or its directors, employees, servants or agents including individual experts and members of its technical committees and IEC National Committees for any personal injury, property damage or other damage of any nature whatsoever, whether direct or indirect, or for costs (including legal fees) and expenses arising out of the publication, use of, or reliance upon, this IEC Publication or any other IEC Publications.
- 8) Attention is drawn to the Normative references cited in this publication. Use of the referenced publications is indispensable for the correct application of this publication.
- 9) Attention is drawn to the possibility that some of the elements of this IEC Publication may be the subject of patent rights. IEC shall not be held responsible for identifying any or all such patent rights.

International Standard IEC 82079-1 has been prepared by IEC technical committee 3: Information structures, documentation and graphical symbols, in liaison with ISO technical committee 10: Technical product documentation, and with the ISO Committee on consumer policy (COPOLCO).

This first edition cancels and replaces IEC 62079 published in 2001. It constitutes a technical revision.

The text of this standard is based on the following documents:

FDIS	Report on voting
3/1093/FDIS	3/1103/RVD

Full information on the voting for the approval of this standard can be found in the report on voting indicated in the above table.

This publication has been drafted in accordance with the ISO/IEC Directives, Part 2.

The committee has decided that the contents of this publication will remain unchanged until the stability date indicated on the IEC Web site under "<http://webstore.iec.ch>" in the data related to the specific publication. At this date, the publication 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.**

# PREPARATION OF INSTRUCTIONS FOR USE – STRUCTURING, CONTENT AND PRESENTATION –

## Part 1: General principles and detailed requirements

### 1 Scope

This part of IEC 82079 provides general principles and detailed requirements for the design and formulation of all types of instructions for use that will be necessary or helpful for users of products of all kinds, ranging from a tin of paint to large or highly complex products, such as large industrial machinery, turnkey based plants or buildings.

NOTE The term "product" as defined in 3.29 relates to consumer, non-consumer, electrical, electronic, electromechanical, mechanical and other products.

This part is intended for all parties involved in the preparation of instructions for use, for example:

- Suppliers, technical writers, technical illustrators, software designers, translators or other people engaged in the work of conceiving and drafting such instructions for use;

This part of IEC 82079 does not specify a fixed amount of documentation that has to be delivered with a product. This is obviously not possible because this part is applicable to all kinds of products. The amount of documentation required, will depend on the nature of the product, its complexity and the skills of the intended users.

### 2 Normative references

The following documents, in whole or in part, are normatively referenced in this document and are indispensable for its application. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

IEC 60204-1:2005, *Safety of machinery – Electrical equipment of machines – Part 1: General requirements*

IEC 60417, *Graphical symbols for use on equipment*

IEC 60529, *Degrees of protection provided by enclosures (IP Code)*

IEC 60617, *Graphical symbols for diagrams*

IEC 62507-1, *Identification systems enabling unambiguous information interchange – Requirements – Part 1: Principles and methods*

IEC/PAS 62569-1:2009, *Generic specification of information on products – Part 1: Principles and methods*

ISO 3864 (all parts), *Graphical symbols – Safety colours and safety signs*

ISO 3864-2, *Graphical symbols – Safety colours and safety signs – Part 2: Design principles for product safety labels*