



# IS YOUR INFORMATION FOR USE IEC/IEEE 82079 COMPLIANT?

QUICK SCAN TO FIND OUT IF YOUR INFORMATION FOR USE AND THE INFORMATION MANAGEMENT PROCESS COMPLY WITH THE INTERNATIONAL STANDARD FOR INFORMATION FOR USE.

## INSTRKTIV

USER INSTRUCTIONS

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# CHECKLIST FOR FULFILLING OF THE REQUIREMENTS ON INFORMATION FOR USE

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## Applies to all products

- ▶ Information for use provides the necessary information for the target audiences to make safe, efficient and effective use of a supported product.
- ▶ Information for use is an integral part of the supported product.
- ▶ Information for use is usable and relevant for the target audiences with respect to their expected tasks and goals.
- ▶ Information for use promotes the safe operation and maintenance of the supported product.
- ▶ Information for use meets the target audiences' needs for information quality by being complete, correct, concise, comprehensible and accessible. The principles of minimalism in technical communication shall be applied.
- ▶ The content of the information for use covers the needs of the target audiences for the safe, effective and efficient use of the product, applying the principle of minimalism.
- ▶ Information for use describes the intended use and reasonably foreseeable misuse.
- ▶ Information product can be identified (e.g. by the wording 'Installation manual' or 'User instructions').
- ▶ The supported product can be identified in the information for use.
- ▶ The supplier can be identified in the information for use.
- ▶ The importance of retaining printed information for use is emphasized.
- ▶ Presentational conventions are listed and explained.
- ▶ Consistent terminology is used.
- ▶ Unavoidable acronyms, abbreviations and technical terms are listed and explained.
- ▶ Safety signs, graphical symbols, pictograms and markings placed on the supported product and packaging are explained.
- ▶ Information for use contains a general description of the supported product, including a visualization.
- ▶ The product description includes the product's specifications.
- ▶ Supplied accessories, consumables and spare parts are mentioned.
- ▶ Where legal requirements, safety, or technical reasons prohibit the installation, operation or maintenance of the supported product by non-skilled persons, this is made clear in the information for use. The qualifications, competencies and skills required are clearly stated in the information for use.
- ▶ Information for use contains repacking information.
- ▶ Information for use contains transportation and storage information.
- ▶ Information for use contains installation information.
- ▶ Information for use contains commissioning information.
- ▶ Information for use contains modification information and/or restrictions.
- ▶ Information for use contains (normal) operation information.

- ▶ Information for use contains information on exceptional and emergency situations.
- ▶ Information for use contains information on indications of faults and warning signals of the supported product.
- ▶ The meaning of signals is explained.
- ▶ Information for use contains information on the maintenance of the supported product by non-skilled and skilled persons.
- ▶ Maintenance and service procedures of complex systems are included.
- ▶ Information for use contains information on troubleshooting and repair of the supported product by non-skilled and skilled persons.
- ▶ Information for use contains information on the replacement of parts of the supported product by non-skilled and skilled persons.
- ▶ Information for use contains information on disassembly and recycling, disposal of the supported product.
- ▶ Information for use contains safety-related information, such as safety signs, safety notes and warning messages.
- ▶ Safety notes are provided in a separate clause or section at the beginning of the information for use.
- ▶ Precautions for particular target audiences such as children or older persons are given.
- ▶ The design of the warning messages is consistent.
- ▶ Signal words for harm to persons or damage to property are used.
- ▶ Instructions for assembly of self-assembly products make safe, efficient and effective assembling of the product possible.
- ▶ Information regarding security and data privacy is given.
- ▶ The most common methods of providing information protection or assurance are taken into account when creating, exchanging, delivering or storing information.
- ▶ Where training is required for the target audiences, this shall be specified in the information for use.
- ▶ Information for use is structured so as to enhance its usability and according to the requirements and principles in the standard.
- ▶ Information for use is easily searchable and contains convenient navigation and unambiguous contents.
- ▶ Information for use contains predefined information types.
- ▶ One of the following approaches is used to structure the content:
  - ▶ Developing an information model by using a structuring method.
  - ▶ Use of an existing information model (e.g. an open source information model).
  - ▶ Adapting an existing information model by using a structuring method.
- ▶ Step-by-step instructions have a detailed structure: preliminary information, instructional steps, and completion information.
- ▶ The media and format of the information for use is based on the needs of the target audiences.
- ▶ The medium allows easy access to information for use.
- ▶ The chosen media are durable.
- ▶ Information for use is provided inside the packaging, on or within the product, on the packaging (but not only on the packaging), on websites or as separately provided collateral documentation.
- ▶ The pages of printable information are designed for legibility.

- ▶ Downloadable information displays clearly on commonly used devices.
- ▶ The conditions of use of the supported product are addressed when choosing the media and format for information products (e.g. in case of low light, the medium should light up the text, speech should not be used in a noisy environment and paper should not be used in wet environments or cleanrooms).
- ▶ Formatting is consistent.
- ▶ Text fonts, safety signs and graphical symbols are clearly legible and follow the recommended minimum sizes.
- ▶ Brightness and contrast are maximized.
- ▶ Graphical symbols comply with international standards.
- ▶ Clear illustrations are used to enhance text.
- ▶ Tables are clear and informative and have a consistent design.
- ▶ Colours are only used to draw attention to particular sections of information.
- ▶ Icons are clear and used unambiguously.
- ▶ Attention shall be attracted to safety-related information.
- ▶ Warning messages are durable and visible.

## Applies to products for which the fulfilment of the requirements has been claimed

- ▶ Fulfilment of the requirements of Clause 7 have been assessed by a suitably qualified and experienced person conducting a **comprehensiveness check** to assess whether or not the required content has been included in the information for use.
- ▶ Fulfilment of the requirements of Clause 8 and 9 for structure, media and format of information for use is evaluated/**inspected for effectiveness** by a suitably qualified and experienced person via a desk check.
- ▶ Evaluation of information for use of a consumer product includes an empirical effectiveness check (e.g. as a result of interviews or usability testing) to demonstrate that the information for use is effective for the target audience.
- ▶ Information for use is evaluated to determine if residual risks from the product risk assessment have been addressed (e.g. does the information for use include appropriate warnings for hazards?).
- ▶ The information for use is complies with the relevant product-specific safety standard(s)?
- ▶ A separate legal check been conducted.
- ▶ The results of the evaluation have been documented.

# CHECKLIST FOR THE INFORMATION MANAGEMENT PROCESS

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## Applies to all products besides consumer products

- ▶ Repeatable information management processes are used.
- ▶ Analysis and planning of information begins with an organisational strategy and policy.
- ▶ The process of design and development, including review, editing and testing are managed.
- ▶ Production and distribution of information for use are managed.
- ▶ Sustainment, maintenance and improvement of information for use are managed.
- ▶ The creation of information for use is assigned to competent persons.
- ▶ Various levels of proficiency are identified.
- ▶ The translation of information for use is assigned to competent persons.

## Applies to products for which the fulfilment of the requirements on the information management process has been claimed

- ▶ Fulfilment of the requirements in Clause 6 of the standard relating to the information management process is evaluated by a suitably qualified and experienced person.
- ▶ The competencies of the technical writers responsible for the development of information for use, including checking and proofreading, are evaluated (e.g. by interviews and documented evidence showing experience).
- ▶ The results of the evaluation have been documented.

**NOTICE** For a more comprehensive check please consult the IEC/IEEE 82079-1 standard or contact us at [info@instrktiv.com](mailto:info@instrktiv.com).

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