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National Standard of the People's Republic of China

GB 5296.1-200x

Replacing GB 5296.1-1997

Instructions for use of products of consumer interest –

Part 1: General principles

(ISO/ IEC Guide 37:1995, Instructions for use of
products of consumer interest, MOD)

(draft for approval)

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Foreword

Of the normative technical requirements in the present section of GB 5296, 6.2, 8.2.1.7, 8.2.4, 8.6.2 and chapters 13 and 14 are recommended, and all the other chapters and clauses are mandatory.

The following 7 sections of GB 5296 (Instructions for use of products of consumer interest) have been published to date:

Part 1: General principles

Part 2: Instructions for use of household and similar electrical appliances

Part 3: General labelling for cosmetics

Part 4: Textiles and apparel

Part 5: Toys

Part 6: Furniture

Part 7: Sports equipment

The present part is Part 1 of GB 5296.

The present part has revised and adopted the guidelines found in ISO/ IEC Guide 37: 1995 “Instructions for use of products of consumer interest” (English version).

The present part has revised the order of several clauses in ISO/ IEC Guide 37: 1995 “Instructions for use of products of consumer interest.”

Appendix B provides a table that compares the numbers of the chapters and clauses in the present part and those in ISO/ IEC Guide 37: 1995.

According to the actual conditions in China and issues that have arisen during the implementation, the present part has made several additions and revisions have to ISO/ IEC Guide 37: 1995 “Instructions for use of products of consumer interest”, indicated by a single vertical line to the right of the relevant articles. Appendix C outlines technical differences and the reasons for the revisions for reference.

The present part replaces and voids GB 5296.1-1997 as of its date of issuance.

The main differences between this part and GB 5296.1-1997 are as follows:

- Description and composition have been brought in line with the compulsory requirements of the national standards, and an introduction has been added;
- The signs have been brought in line with international standards according to the requirements in GB/T 20000.2—2001;
- The ISO/ IEC Foreword and Introduction have been removed;
- The term “products of consumer interest” has been added;
- The definition of “instructions for use” has been revised (3.2 in the 1997 edition; 3.3 in the present edition);
- Regulations for product name labelling have been added (4.2);
- Supplementary regulations for clear labelling of expiry dates have been added (4.9);
- The addition of the product standard number that indicates manufacturer’s name, address and implementation is now required;
- Requirements for instructions for use for small products and packaging have been added;
- Regulations for the height of the Chinese characters in the instructions have been added (8.2.1.1, 8.2.1.2);
- The corresponding point values for the font sizes in ISO/IEC Guide 37 have been revised (8.2.1.3, 8.2.1.4);
- “Health” has been revised as “suitability” (8.2.3);
- Supplementary provisions for colour usage have been added (8.3.3);
- Samples have been revised (8.5.3 in the 1995 edition; 8.5.3 in the present edition);
- The provision of Chinese instructions has been assured, and their position in the instructions specified (8.6.1);
- Requirement for standard Chinese characters has been added (8.6.3) ;
- Regulations governing the use of graphics in different languages have been revised and supplemented (8.6.4 in the 1997 edition; 8.6.4 in the present edition);
- Regulations governing the layout of the text have been added (chapter 13);

— Some terms and expressions in several clauses have been revised for the purpose of accuracy and completeness.

Appendices A, B and C of the present part are informative appendices.

The present part has been put forward by China National Institute of Standardisation.

The present part is the responsibility of the National Technical Committee of Standardisation of Services.

The main entities involved in drafting the present part: China National Institute of Standardisation, China Consumers Association, Centre for Laws and Regulations, General Administration of Quality Supervision Inspection and Quarantine of the People's Republic of China, and Deren Group.

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The previous versions replaced by the present part are: GB 5296.1—85, GB 5296.1—1997.

Introduction

These “instructions for use” are intended to inform consumers about the correct and safe ways to use products, and they play an important part in protecting consumers’ personal safety, their property and their personal health as well as in protecting against environmental pollution, preventing fraud and misleading information, and protecting consumers’ rights.

The present part of GB 5296 is an important drive and guidance in developing other parts of the national standard on “instructions for use of products of consumer interest”, and facilitating the standardisation of instructions for use in China.

The present part consists of the general principles of GB 5296, and as such it does not cover all the detailed provisions of instructions for use of each category of products of consumer interest. Therefore, the principles in the present part will serve as general provisions for all the interested parties in their design and development of instructions for use in each category.

Instruction for Use of Products of Consumer Interest

Part 1: General Principles

1 Scope

1.1 The present part of GB 5296 specifies principles and methods for developing instructions for use of products of consumer interest (hereafter referred to as instructions).

The present part is intended for

- designers and manufacturers of products of consumer interest, and drafters of technical documents and other writers of similar instructions;
- technical committees or organisations setting up standards for products of consumer interest.

Note: for instructions of industrial products see GB9969.1-1998 “General Principles for Preparation of Instructions for Use of Industrial Products.”

1.2 The principles and methods in the present part are to be used in conjunction with the standards for instructions for specific products.

1.3 The present part includes evaluation methods for instructions of consumer products (see Appendix A) to be used as evaluative methods and rationale to review the comprehensiveness of the instructions for use and assess the quality of the written instructions.

Appendix A is intended primarily for accreditation researchers, specialists and agencies responsible for assessing consumer products. It may also be of interest to the users and managers mentioned in 1.1 of the present part.

2 Cited Normative Documents

The clauses in the documents below become clauses of the present part of GB 5296 by virtue of being cited by the present part. If a cited document is dated, its subsequent revision sheets (not including the corrigenda) or amendments do not apply to the present part. Nevertheless, parties to agreements based on the present part are encouraged to study whether the most recent versions of these documents can be used. If a cited document is not dated, then the most recent version applies to the present part.

GB 2893.1 Graphical Symbols - Safety Colours and Safety Signs - Part 1: Design Principles for Safety Signs in Workplaces and Public Areas (GB 2893.1—2004, ISO3864.1: 2002 MOD)

GB 2893.2 Graphical Symbols - Safety Colours and Safety Signs - Part 2: Design Principles for Safety Signs on Goods

GB 2894 Safety Signs (GB 2893.2—1996, ISO3864: 1984 NEQ)

GB/T 5465.2 Graphical Symbols for Use on Electrical Equipment (GB/T 5465.2—1996, IEC 60417: 1994 IDT)

GB/T 7291 Graphical Symbols based on Technical Guides Required by Consumers (GB/T 7291—200x, ISO/IEC Guide 74: 2004 MOD)

GB/T 10001.1 Public Information Graphical Symbols for Use on Signs (GB/T 10001.1—2006, ISO7001: 1990 NEQ)

GB/T 16273.1 Graphical Symbols for Use on Equipment— Part 1: Common Symbols (GB/T 16273.1—1996, ISO 7000: 1989 MOD)

GB/T 16273.4 Graphical Symbols for Use on Equipment— Part 4: Symbols Incorporating Arrows

GB/T 16900 Rules for Presentation of Graphical Symbols General Principles

GB/T 20000.8 Guide for Standardization— Part 8: Child Safety Aspects for Their Inclusion in Standards (GB/T 20000.8—200x, ISO/IEC Guide 50:2002, Child Safety and Standards —General Guidelines IDT)

3 Terms and Definitions

The following terms and definitions apply to the present part of GB 5296.

3.1

Consumer

A member of society who purchases or uses a product of consumer interest or accepts a service in order to meet a need in their lives.

3.2

Products of consumer interest

Products sold to meet the needs of members of society in their lives.

3.3

Instructions

Information conveyed to users on how to use products correctly and safely and on product functions, basic properties, and characteristics relating to said products. They are usually presented in the form of a user's manual, label, or nameplate. They can be represented, either on their own or in combination, through documents, words, marks, symbols, pictures or charts, graphic expressions, or audio or visual information. They can be used on a product [including instructions on an operating device of equipment (keys or buttons) or instructions electronically displayed during operation] or on packaging. They can also be delivered as accompanying documents or materials (e.g. loose-leaf information sheet, manuals, audio and video tapes, and CDs).

4 General Principles

4.1 Instructions are a mandatory part to be included with the product.

4.2 The instructions shall ensure that:

- a) they clearly identify a product and reflect its true nature;
- b) the product designation, model and trademark correctly identify a product, and comply with the relevant national regulations;
- c) the types of usage and functions are clearly labelled;
- d) the expected use is specified, if applicable;
- e) all information and required services for the correct and safe usage of a product is included.

4.3 The instructions shall, where appropriate, include the following information, either separately or together:

- a) Function and operation;

- b) Transportation, assembly, installation and storage;
- c) Cleaning, maintenance, diagnosis, and repair;
- d) Possible impact on safety or environment caused by disposing (or handling) products or waste, and.

4.4 The instructions shall provide consumers with the following important information related to:

- Environment (e.g. appropriate amount of detergent to be used by a washing machine, and treatment or disposal and reuse of waste);
- Conservation of energy resources or other resources.

4.5 The instructions shall assist the consumer in the proper use of a product, provide instructions against any misuse of the product that can be reasonably predicted, and provide adequate warnings to ensure the consumer does not misuse the product in such a way that it may cause danger or risk.

4.6 The instructions shall not be used to make up for any design flaws in the product.

4.7 The instructions shall clearly note any such preventative measures that should be followed when using the product to protect the user or other individuals that may be present (e.g. children should be supervised by an adult or the user should wear special clothing). Risks to specific groups (such as children, the elderly or handicapped people) should be specified.

4.8 In the event that the instructions are intended only for the use of specific groups (such as experts responsible for installing, repairing or maintaining the product), the instructions should be compiled and supplied separately and labelled accordingly. Such instructions do not have to be supplied with the product if they don't compromise its operation.

4.9 In the event that a product is supplied with a limited safety period or an expiry date, the date of manufacture, the safety period of usage and quality guarantee period (or expiry date) should be provided; when supplied to the consumers, the packaging should also clearly state the date of manufacture, the safety period of usage and quality guarantee period (or expiry date) on a prominent position.

4.10 The manufacturer's name and address, together with the product standard number, shall be clearly labelled on the instructions.

4.11 Instructions and similar information shall be labelled with the publishing date and edition number.

4.12 For products or retail packaging whose largest side is less than 10cm², information other than the product name, manufacturer's name and the manufacturing date, the safety period of usage and quality guarantee period (or expiry date) can be placed elsewhere in the instructions.

4.13 The main technical information on the instructions of a product and other similar information (such as on advertisements and packaging) from the same manufacturer and printer should be consistent.

4.14 The wording "Please read the Instructions carefully before using this product" should be stated on a prominent position on the packaging or the cover of the instructions manual.

5 Clauses of the Standard regarding the Instructions

5.1 Products standards involving the rights of consumers shall include clear provisions governing the content of the instructions (they should, for example, be described in the simplest form possible). The instructions should be a separate chapter in the consumer products standards, and shall be entitled "Instructions" (including installation and maintenance).

5.2 For products with specialist procedural requirements governing the safe use, operation, assembly, disassembly, cleaning and maintenance, as well as its disposal (treatment) or treatment of the product's waste, such requirements shall be clearly described in the product standards.

5.3 When the instructions are provided on a product itself or its packaging, detailed descriptions shall be given in the product standards under chapters and clauses related to labelling and signs.

6 Position and Form

6.1 The position, form and style of the instructions provided and the actual information included shall depend on one or several of the following factors:

- Risk or danger;
- Environmental or similar requirements;
- Product design;
- Requirements of consumers for certain information under special circumstances.

The above factors determine whether or not the instructions should be provided in their entirety or in part in one or several of the following forms:

- On product;

— On packaging;

— In accompanying literature or information provided with the product.

Note: Providing instructions on a product itself has clear benefits to consumers in terms of convenience. However, this is not practical for products, with certain shape and small size or when the view is likely to be partially obstructed during the use of the product. Therefore, the best or the only solution may be to place some or all of the instructions on the packaging or in accompanying literature.

6.2 When the instructions are complicated in nature, other methods can be used, such as providing important information in the form of brief description, prompt cards, labels or signs on the product. Such methods should be used whenever possible.

6.3 When safety depends upon the care the consumer takes in correct installation, use, maintenance, disposal or handling of the product, and when the correct procedures are easily disregarded, product safety standards shall at the very least specify a warning sign to remind the consumer of the relevant sections of the instructions.

7 Information Provided at Point of Sale

When the instructions are a necessary element in helping consumers make a rational purchasing choice from a range of products, the instructions or its related parts shall be supplied at the point of sale.

Note: Providing consumers at the point of sale with all the information needed to enable them to make an informed purchasing decision is a method recommended in the product information system (see GB/T xxxxx- 200x). This information includes some of the situations mentioned in the present part, such as the need for protective clothing or parental control (see 9.5).

8 Composition requirements

8.1 General Principles

8.1.1 The instructions shall clearly identify a specific product and its model, type and category, and shall not cause discrepancy between the instructions given to the consumer and the actual product to be used, due to, for whatever reason, differences between a model and its upgrade model or two different models (irrespective of the extent of the difference), or between two products with the same model number but different technical specifications (see 4.11).

8.1.2 The consumer should be provided with the instructions for a specific product with a single model number. In cases where two or more models share the same instructions, it is

permissible to provide the instructions for several models, provided that the consumer's model is clearly marked.

8.1.3 Instructions related to optional components or accessories should be clearly differentiated from the main body of instructions and other components or accessories (for example with sub-clauses and sub-titles) to avoid confusion on the part of the consumer.

8.2 Legibility

8.2.1 The font and font size of the instructions on the product, as well as the font and font size of the printed data and word-processed data, should be clear and sufficiently large to ensure an adequate degree of legibility.

8.2.1.1 In compliance with the requirements in 8.2.2, 8.3.1 and 8.3.3, the height of the font in the Chinese instructions on the product or on the product packaging shall be no less than 1.8 mm (5.25 pt, font size 7). A larger font shall be used if the conditions permit.

8.2.1.2 The height of the font in the Chinese instructions shall be no less than 3.2mm (9 pt, small font size 5).

8.2.1.3 In compliance with the requirements in 8.2.2, 8.3.1 and 8.3.3, the x height (the height of relatively low letters) of the English letters (typeface) on the product or product packaging shall be no less than 1.5mm (4.27 pt).

Note 1: The font size shall be 4.27 pt in the Pica measurement of the typesetting point system (Pica: 1pt : \approx 0.351mm).

Note 2: Fonts and font sizes for letters other than Latin letters shall similarly be clear and legible.

8.2.1.4 Instructions in English (such as loose-leaf sheets, documents and manuals) shall use fonts of between 3.2mm to 5.6mm (9 pt to 16 pt).

8.2.1.5 Titles in the instructions (such as on loose-leaf sheets, in documents, and manuals), instructions on the product and other brief information that the consumer intends to read on a regular basis shall use a font size of over 3.7mm (10.5 pt, font size 5) depending on the reading distance.

8.2.1.6 The position of the instructions on the product and the surface on which they are placed form a vertical angle with the reader, and shall be such that they will be clearly legible to the user when he uses the product.

8.2.1.7 The relevant standards can include more numeric regulations regarding the legibility of instructions, particularly with regard to the font size and the reading distance.

8.2.2 Luminance contrast—the differential between the percentages of reflected light from the background of the print and the print itself shall be no less than 70%.

Note 3: The luminance contrast of good quality print on white paper is roughly 80%.

Note 4: Care should be taken to avoid a reduction in legibility of the print due to a lower luminance contrast caused by having print on both sides of thin paper.

Product standards shall specify minimum requirements for the font size and luminance contrast in line with the above parameters.

8.2.3 Parts of the instructions related to safety issues shall employ different fonts or font sizes or other methods so that they can stand out. If there is any uncertainty as to whether the instructions pertain to safety or appropriateness, the former should be assumed.

8.2.4 Letters, figures and symbols in the instructions can be stamped into or raised from metal, glass or plastic surfaces to make them more durable and less likely to be lost or dispersed. However, this should be compared with quality printing and clarity shall always take priority (see 12.1).

8.3 Colours

8.3.1 Clear, easily and readily distinguishable colours shall be used, especially with control units, important units or components.

8.3.2 The use of colour should be functional, systematic, and consistent (see GB 2893.1, GB2893.2 and GB2894).

8.3.3 As some individuals have difficulty distinguishing colours, instructions in which colour is used to represent specific meaning shall not rely solely on the use of colour, but should also use textual description or other means.

8.4 Principles of Description

8.4.1 In order to achieve the best result, the instructions should be written in the principle that that a user will not be able to use a product until he understands the description, and the clear instructions should be organised in the same order as the product is used.

Note 5: When quick reaction is required (e.g. in the case of fire extinguishers), the instructions shall ensure that only the most simple and direct thought process is required for the consumer to understand the instructions and be able to use the equipment.

8.4.2 In cases where the safe and correct use of a product requires following complex operational procedures, the instructions shall assist and encourage the consumer to understand and become familiar with these procedures. Effective methods to achieve this

include providing illustrated instructions, charts and tables, and flow diagrams (see 8.7, 8.9 and 8.10).

8.4.3 When the instructions of products contain several different or separate functions, they shall first explain the basic and general functions before progressing to other types of functions.

8.4.4 The instructions of a product shall predict any potential question the consumer may have, and provide the consumer with answers. (for example, raising questions with the words “Where? Who? What? When? How? and Why? and give answers).

8.5 Description and Use of Technical Terms

8.5.1 Instructions shall be as concise as possible, making it easy for the consumer to understand them, and when technical terms have to be used, they should be supported with definitions and interpretations. The technical terms, symbols and units should be used consistently throughout the instructions to provide the same information, and conform to relevant national regulations.

8.5.2 The text in the main body of the document shall follow the principles of description as laid out in 8.4. Concise titles and notes can be used to help users find specific information (see 8.11).

8.5.3 In generally, one sentence contains only one point/requirement or few closely related points/requirements. For the sake of clarity:

- Use verbs in active rather than passive voice;
- Requirements shall be firm, avoiding unclear or weak terms;
- Use action verbs rather than abstract nouns;
- Use straightforward vocabulary, and avoid euphemistic language.

Samples provided in Table 1:

Table 1: Description and Use of Technical Terms

Principles of Description	Correct expression	Incorrect expression
Use active voice	Turn off power supply	Ensure that power supply has been stopped
Use firm language	Do not touch the bracelet	The bracelet should not be touched
Use action verbs	Avoiding accidents	The avoidance of accidents

Straightforward and concise	Pull the control lever	The user pulls the control lever back from the apparatus
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8.6 Language

8.6.1 Products of consumer interest sold in China shall have Chinese instructions, and Mandarin shall be used for audio instructions (including prompts during the process of use).

Note: Consumer goods for export shall have instructions written in the official language of the country in which they are sold.

8.6.2 For products sold in China whose instructions required more than one language, the Chinese version shall be placed before the other language version(s). The Chinese titles shall be clearly and prominently marked, and each language version shall be clearly separated from one another.

8.6.3 The Chinese instructions shall be written down in standard Chinese characters.

Note: Instructions for consumer products sold in Hong Kong, Macao, Taiwan or overseas can be written in traditional Chinese characters if required.

8.6.4 When the Chinese instructions are translated into other languages, the entire text, including notes, shall be translated. For graphics without a legend, the caption can be translated while the original graphic is referred to.

8.6.5 When the instructions are translated from one language to another they shall be translated by an authoritative linguist and technical expert in the entire process, including review.

8.7 Graphics

8.7.1 Care must be taken to ensure clarity and quality of graphics, whether they are photographs, line graphs or other formats.

8.7.2 At no time shall graphics be separated from the relevant text, and the graphics and the text shall correspond with each other. If they are describing a continuous operation, the main text and graphics shall be shown in the same order.

8.7.3 Details of graphics shall be annotated, to identify the position of control units and components/ accessories.

8.7.4 A graphic shall not include any information other than that required for its function.

8.7.5 When needed, a graphic or details of the graphic shall be repeated in relevant parts of the instructions.

8.7.6 The graphics, tables and flowcharts in clauses 8.7 to 8.10 can be folded and attached to the instructions (as loose sheets or a manual) to facilitate reference whilst a reader is on a different page of the main text.

8.8 Graphical Symbols

8.8.1 Graphical symbols shall be easily decipherable, and have a single meaning. They shall comply with the provisions in GB/T 5465.2, GB/T16900, GB7291, GB/T 10001.1, GB/T 16273.1 and GB/T 16273.4.

8.8.2 The instructions shall clearly indicate and explain the product functions represented by the symbols that appear on the product.

8.9 Tables

8.9.1 Where clarity is particularly crucial, information shall be represented in a table. The table and corresponding text must appear together (see 8.7.6).

8.9.2 Where the consumer may require assistance, the table or part of the table shall be repeated in a relevant part of the instructions.

8.10 Flowcharts

Flowcharts are required to help the consumer understand and handle the operational procedure, enabling them to use the product in a safe and correct way. The flowchart should be placed together with its corresponding text (see 8.7.6).

8.11 Contents (Index Table)

8.11.1 When the instructions have more than one page (including the folded format), each page shall be numbered. For loose-leaf and manual formats, a table of contents (index table) shall be included when there are more than four pages.

8.11.2 Relatively long or complex instructions shall have an index, with key words alphabetically ordered according to their Chinese phonetic *pinyin* spelling. The index shall be included in the contents.

8.11.3 For complex apparatus, separate contents shall be provided for controls or indicators (such as dials, meters and indicators).

8.11.4 The section titles in the contents must be the same as the section titles in the text.

8.12 Trouble-Shooting, Monitoring and Maintenance

Where a consumer may be able to diagnose and solve certain problems in the product without any risk to themselves, others or the product itself, the instruction sheet or manual

shall include a trouble-shooting table and relevant maintenance information with appropriate graphics and explanations. These shall indicate the possible causes of the problems and if the consumer should try to repair the fault themselves or consult a professional.

9 Safety Warnings

9.1 Products that could present risks to consumers' safety during use shall have safety warnings. According to the provisions in 8.2.1 to 8.2.4 and 8.3, such safety warnings shall be reinforced with large or different fonts, special symbols or colours.

9.2 For optimum effect, the style and composition of the safety warnings shall take the following points into consideration:

- Content and illustrations shall be clear and to the point;
- The position, content and format of the safety warnings shall be eye-catching and obvious;
- The safety warnings must be visible from the point of view of the user during the normal operation of the product;
- They should explain the nature of the risk (and, where necessary, the causes of harm);
- They must give clear guidance on what to do;
- They must give clear guidance on how to avoid danger;
- They must use clear language, graphical symbols and illustrated explanations (see 8.6 to 8.10) ;
- Note that overly repetitive and misleading warnings will compromise their effectiveness.

9.3 The warning labels in the instructions should use the following grading system and warning terms, depending on the level of danger:

- “Danger”, when a high level of caution should be exercised;
- “Warning”, when a moderate level of caution should be exercised;
- “Caution”, when caution is advised owing to a minor risk.

9.4 Products with a high or moderate degree of risk shall have permanent safety warnings affixed to the product, enabling the consumer to clearly read the content in its entire service life;

9.5 Danger warnings or restrictions to use (such as “not suitable for children under three years old”) are critical and should be clearly labelled. Warnings such as this should be clearly visible at the point of sale (see the relevant provisions in GB/T 20000.8).

10 Standardised Terminology and Labelling

In order for the warnings signs to convey important information adequately, they shall be placed in an appropriate position and use standardized terminology, safety labels or graphical symbols. Regulations governing the appropriate terminology, labels and positions should be found in the relevant product standard.

11 Audio-Visual Signals

11.1 Visual signals (such as flashing lights) and audio signals (such as horns) can be used to alert or warn consumers. Either one or a combination of both may be used where appropriate.

11.2 Audio-visual signals shall conform to the following requirements:

- Clarity;
- Timely and immediate transmission, enabling the user to take action to avoid danger or fault;
- Must be clearly identified and differentiated from other signals;
- Must have a corresponding explanation either in the instructions or on the product itself;
- The consumer must be able to clearly receive the signal emitting from the product from their position whilst using the product.

11.3 Easy access for inspection and repair should be taken into account when designing and fitting the audio-visual signals. Their installation should be clearly explained in the instruction manual or in the instructions on the product. If required, the instructions shall specify routine inspections.

11.4 If required, the product standard should specify which audio-visual signals are to be used.

12 Durability of Instructions

12.1 The instructions on a product should be intact and easily readable for the entire duration of its service life.

12.2 Instructions on the packaging or in the accompanying information (such as loose sheets or manuals) shall be made of durable material; they should be durable enough for the consumer to read them many times during the product's service life or in the circumstances where the product is used.

12.3 With the exception of instructions solely applicable to the initial assembly or installation of the product, the instructions should be clearly labelled "Please keep for future

use”, and the manufacturer shall supply replacement instructions for the duration of the service life of the product if required.

12.4 It is not practical to have durable instructions printed on the packaging of a product, as the packaging itself is not durable and may be damaged when the product is unpacked. If the durable instructions are printed on the packaging, the wording “Please keep for future use” should be printed on the packaging. In cases where only the part containing the instructions needs to be kept, that part should be easily removable from the packaging.

13 Layout

The layout of the instructions depends on the nature and usage of the actual product. Please refer to the examples in table A.1 to select the appropriate layout with necessary addition or deletion.

14 Evaluation of Composition Quality

Please refer to the relevant parts in Appendix A and the requirements as laid out in Table A.2.

Appendix A

(Informative Appendix)

Evaluation of Instructions

A.0 Introduction

This appendix has been written for the purpose of applying the present part more effectively and implementing its content more thoroughly.

A.1 General Principles

The instructions to be evaluated include instructions on a product, on the packaging of a product, and in accompanying literature or media (such as loose sheets, manuals, audio tapes, video tapes, or CDs) (see 3.3). According to 4.1, instructions are an integral part of the product.

A.2 Methods

The following formats can be used for evaluation according to the complexity of a product and the importance of ensuring safety and correct use.

- Desk study
- User group evaluation

A.3 Desk Study

A.3.1 Desk study/evaluation shall be carried out by appropriate qualified experts with no affiliation to or involvement in the design, manufacture, sale or composition of instructions of the product in question.

A.3.2 The desk research shall at times require additional review by an independent third party; for example, information required for marketing (see chapter 7). The actual circumstances shall be assessed by the researcher or independent evaluators, and shall not rely on statements of the manufacturer.

A.3.3 The instructions shall include basic information, which can be assessed with a qualitative check using Table A.1.

A.3.4 Composition quality shall be assessed according to the Evaluation table A.2.

A.3.5 Both tables contain basic requirements which shall be supplemented or kept consistent with specific standards relevant to the product. In the absence of such

standards, additional regulations from standards of comparable products or those with comparable functions can be used and specified with any other suitable method.

A.4 User group evaluation

A.4.1 Group evaluation is a way to test how suitable the instructions are for consumers of a product. In these tests, participating consumers are asked about the range of problems they might encounter when using the product in question (including those relating to safety and environment). These tests can confirm the extent to which the instructions conform to the product's design, ergonomics and functions.

A.4.2 Evaluation groups shall consist of consumers or potential consumers of the product, and the following factors shall be taken into account:

- a) Age;
- b) Gender;
- c) Health;
- d) Physical ability (impairment);
- e) Left or right handed;
- f) Level of education, literacy, special skills;
- g) Previous exposure to similar products.

In most cases the evaluation groups shall consist of five individuals to ensure reliable results. Nevertheless, larger numbers may be needed to cover all of the above considerations [from a) to g)].

A.4.3 Generally, each member of the group is asked to fill in questionnaires based on the requirements in tables A.1 and A.2. Audio and video recordings of the evaluation may be taken to help confirm the efficacy of the instructions.

A.4.4 A qualified expert shall supervise each test (see A.3.1). This expert shall make a report based on his or her observations, and should include an analysis of all of the problems encountered by each member of each group.

A.5 Evaluation

A.5.1 Certain requirements can be marked as “important” (I), or “very important” (II), whether the assessment is made by expert evaluation, or group evaluation, or both.

A.5.2 In many cases, the importance of individual items to be evaluated will differ according to the requirements of the product or of the range of products. These items can be arranged for special purposes only.

A.5.3 In order to obtain a comprehensive evaluation of the group, each member of the group shall provide a final evaluation using a six-point grading system (see the upper part of Table A.2) based on his or her own personal experience.

The supervising expert shall be responsible for the results of the final evaluation as described in A.4. He or she will take into account the number of people in the group, and evaluate the difficulty in using the product in a safe and correct way, the questionnaire responses, and the degree or severity of the difficulty (e.g. complaint about risk of physical injury or damage to the product). He or she can specify quantitative or statistical standards. A copy of a report written by the supervising expert shall be provided.

Table A.1 Conformity Table

This table is used to test whether or not instructions include the required information. The following symbols are used to indicate whether or not the instructions satisfy (conform, include) the test items.

- a) Satisfy (conforms to, includes) (⊕)
 b) Does not satisfy (does not conform to, not included) (−)
 c) N/A (O)

Importance (see A.5.1)	Test Item	Conformity (⊕, −, O)	Notes
(b)	1 Identification 1.1 Serial no. and category 1.2 Type, model, category, and sub-category nos. 1.3 Service life or expiry date 1.4 Date of last check (e.g., date manual published following product update) 1.5 Manufacturer/ supplier, seller and other information 1.6 Addresses of manufacturer, customer services supplier 1.7 Certificate 1.8 Specific product standard requirements 1.9 Optional components and accessories		
(b)	2 Product Norms 2.1 Functionality and scope of use		
(b)	2.2 Safe and correct usage		
(b)	2.3 Integrity of design and instructions (the instructions are not to make up for flaws in the design)		
	2.4 Size- quality- capacity		
	2.5 Performance data and measurements		

(b)	2.6 Supply data for power, petrol, water and other consumables (such as detergents, lubricants, etc)		
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Importance (see A.5.1)	Test Item	Conformity (+, -, 0)	Notes
(b)	2.7 Energy consumption and measurements used		
	2.8 Noise, gas, and waste water produced, and measurements used		
	2.9 Safe handling		
(b)	2.10 Personal protection information (e.g. clothing)		
(b)	2.11 Risk information for special groups		
	3 Preparations prior to use of product		
	3.1 Safety measures to be taken prior to installation		
(b)	3.2 Unpacking		
	3.3 Safe handling of packaging		
	3.4 Installation and assembly (special tools, maintenance and repair space)		
	3.5 Storage and maintenance during period of normal use		
	3.6 Repackaging to prevent damage during transit		
(b)	3.7 Information related to operation by qualified personnel. This information shall be supplied separately from instructions aimed at general consumers. Detailed instructions (manual) for qualified personnel.		
	3.8 Position of instructions		
	4 Operation instructions		
	4.1 Basic functions		
	—— Correct use of product		
	—— Can guarantee safe use		

(b)	—— Details on predictable potential misuse		
(lb)	—— Consistent with summary table in related product standards		

Importance (see A.5.1)	Test Item	Conformity (+, -, 0)	Notes
(b)	4.2 Supporting functions (see 4.1)		
(b)	4.3 Optional components and accessories		
	4.4 Personal protection		
	4.5 Quick, concise introduction		
(b)	—— using prompts, stickers and labels		
	—— using key points in the manual as prompts		
	Waste management		
	5 Audio-visual signals		
	6 Repair, maintenance and cleaning		
	6.1 Safety measures (such as personal protection and special equipment)		
	6.2 Maintenance and cleaning to be carried out by consumers		
(b)	6.3 Maintenance and cleaning to be carried out by qualified personnel		
	6.4 Trouble shooting (including illustrations, charts and repair specifications)		
	7 Health and safety		
	7.1 Warning signs (caution)		
	— Correct position:		
	● on product;		
	● on packaging;		
(lb)	● in accompanying materials.		

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Importance (see A.5.1)	Test Item	Conformity (+, -, 0)	Notes
(b) (b) (lb) (lb) (b)	<ul style="list-style-type: none"> — Placed at a suitable and prominent location at the point of sale — Using correct terminology — Using standardised language and characters — Durability of warnings — Consistent with the relevant product standards 7.2 Safety signs 7.3 Information on potential danger 7.4 Safe handling of product following expiry of service life 7.5 Environmental impact of product use 8 Consistency of information The terminology and information in each part of the instructions on a product and packaging and in accompanying literature must be consistent.		

Table A.2 Evaluation Table

This table is designed to evaluate the quality of the composition in the instructions. It uses the following classification system:

a)	Very good (outstanding)	3
b)	Good	2
c)	OK, acceptable	1
d)	Poor	-1
e)	Very poor	-2
f)	n/a (not necessary)	0

Importance (see A.5.1)	Test Item	Evaluation (3, 2, 1, -1, -2, 0)	Notes
	<p>1 Ease of reading</p> <p>1.1 Information on the product</p> <p>—— Font size ¹⁾ in relation to reading distance ²⁾</p> <p>—— Luminance contrast ³⁾</p> <p>—— Instructions on a product</p> <p>1.2 Manuals, loose sheets</p> <p>—— Font size</p> <p>—— Luminance contrast</p> <p>—— Use of different fonts or different font sizes</p> <p>—— Use of colour</p> <p>2 Signals</p> <p>The amount and clarity of information provided for users</p>		

Importance (see A.5.1)	Test Item	Evaluation (3, 2, 1, -1, -2, 0)	Notes
(□)	<p>3 Main text and terminology</p> <p>3.1 Main text and use of vocabulary</p> <p>—— Simple (easily understood) or complex</p> <p>—— Concise or verbose</p> <p>—— One point/requirement per sentence or too much information contained in a single sentence</p> <p>—— Active or passive voice</p> <p>3.2 Terminology used</p> <p>—— Good explanation or confusing (incomprehensible)</p> <p>—— Consistent or not</p> <p>3.3 Structure of the text</p> <p>—— Does the structure make sense or is it confusing?</p> <p>—— Does it conform to principles of expression or does it lack structural logic?</p> <p>—— Does it first explain basic functions followed by more complex functions?</p> <p>—— Is there a clear distinction between the explanation of the product itself and of optional extras?</p> <p>—— Are the titles clear?</p> <p>—— Does it avoid superfluous information?</p> <p>3.4 Principles of description</p> <p>—— Is it conducive to quick response? (instructions for emergency situations should be concise and easy to understand)</p> <p>—— Is it expressed in such a way that complex information is easily grasped?</p> <p>—— Does it use a question and answer format? (using words such as “where?”, “who?”, “what?”, “when?”,</p>		

	“how?”, and “why?”)		
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Importance (see A.5.1)	Test Item	Evaluation (3, 2, 1, -1, -2, 0)	Notes
	<p>4 Language</p> <p>4.1 Are the languages clearly separated?</p> <p>4.2 Are the text and graphics clearly related?</p> <p>4.3 Are the graphics accompanied by clear and helpful captions?</p> <p>4.4 Are there any linguistic errors?</p> <p>5 Explanation of graphics</p> <p>5.1 Overall quality</p> <p>5.2 Are there sufficient graphics, and does each one provide specific information?</p> <p>6 Graphical symbols</p> <p>—— Conform to standardised requirements</p> <p>—— Explained clearly</p> <p>7 Tables</p> <p>—— Placed next to the text</p> <p>—— Clear expression with abundant information</p> <p>—— Repeated when needed</p> <p>8 Flowcharts</p> <p>—— In a suitable place</p> <p>—— Clear</p>	Yes/ no	

Importance (see A.5.1)	Test Item	Evaluation (3, 2, 1, -1, -2, 0)	Notes
	<p>9 Use of colour</p> <p>—— Functional</p> <p>—— Clear</p> <p>—— Consistent</p> <p>10 Contents (index table)</p> <p>—— Text with adequate length and complexity</p> <p>—— Clear, consistent and practical</p> <p>—— Useful keyword table</p> <p>—— Numbered pages</p> <p>11 Troubleshooting advice</p> <p>Clear, useful, appropriate consideration of safety issues</p> <p>12 Durability</p> <p>Will not be mislaid or damaged during the expected (normal) service life</p>		
<p>Note: The evaluation tests described in A.3.2 can also be expressed as a numerical value, omitting 0. If the numerical value is positive, the instructions will be deemed to have passed the test.</p>			
<p>1) If the height of font size x is less than 1.5mm, it is (-1) or (-2).</p> <p>2) Instructions on the product: if there are several instructions at different locations, each will need to be evaluated separately.</p> <p>3) If the luminance contrast is less than 70% it is (-1) or (-2)</p>			

Appendix B

(Informative Appendix)

Provision number comparison between the present part and ISO/IEC Guide 37: 1995

Table B.1 shows the provision numbers for the present part (called Present Part No. in the table) and the corresponding provision numbers from ISO/IEC Guide 37: 1995 (called Int. Guide No. in the table).

Table B.1 Provision Number Comparison between the Present Part and ISO/IEC Guide 37: 1995

Present Part No.	Int. Guide No.	Present Part No.	Int. Guide No.	Present Part No.	Int. Guide No.
1	1	8.2.1.1	—	8.7.6	7.7.6
1.1	1.1	8.2.1.2	—	8.7.7	7.7.7
1.2	1.2	8.2.1.3	7.2.1.1	8.8	7.8
1.3	1.3	8.2.1.4	7.2.1.2	8.8.1	7.8.1
2	2	8.2.1.5	7.2.1.3	8.8.2	7.8.2
3	—	8.2.1.6	7.2.1.4	8.9	7.9
3.1	—	8.2.1.7	7.2.1.5	8.9.1	7.9.1
3.2	—	8.2.2	7.2.2	8.9.2	7.9.2
4	3	8.2.3	7.2.3	8.10	7.10
4.1	3.1	8.2.4	7.2.4	8.11	7.11
4.2	3.3	8.3	7.3	8.11.1	7.11.1
4.3	3.5	8.3.1	7.3.1	8.11.2	7.11.2
4.4	3.6	8.3.2	7.3.2	8.11.3	7.11.3
4.5	3.2, 3.4	8.3.3	7.3.3	8.11.4	7.11.4
4.6	3.2	8.4	7.4	8.12	7.12
4.7	3.7	8.4.1	7.4.1	9	8
4.8	3.8	8.4.2	7.4.2	9.1	8.1
4.9	3.9	8.4.3	7.4.3	9.2	8.2
4.10	—				
4.11	3.10	8.4.4	7.4.4	9.3	8.3
4.12	—				

Present Part No.	Int. Guide No.
4.13	3.11
4.14	—
5	4
5.1	4.1
5.2	4.2
5.3	4.3
6	5
6.1	5.1
6.2	5.2
6.3	5.3
7	6
8	7
8.1	7.1
8.1.1	7.1.1
8.1.2	7.1.2
8.1.3	7.1.3
8.2	7.2
8.2.1	7.2.1

Present Part No.	Int. Guide No.
8.5	7.5
8.5.1	7.5.1
8.5.2	7.5.2
8.5.3	7.5.3
8.6	7.6
8.6.1	—
8.6.2	7.6.1, 7.6.2
8.6.3	—
—	7.6.3
8.6.4	7.6.4
8.6.5	7.6.5
8.7	7.7
8.7.1	7.7.1
8.7.2	7.7.2
8.7.3	7.7.3
8.7.4	7.7.4
8.7.5	7.7.5

Present Part No.	Int. Guide No.
9.4	8.4
9.5	8.5
10	9
11	10
11.1	10.1
11.2	10.2
11.3	10.3
11.4	10.4
12	11
12.1	11.1
12.2	11.2
12.3	11.3
12.4	11.4
13	Table A.1
14	Appendix A, Table A.2

Appendix C

(Informative Appendix)

Technical differences and their causes between the present part and ISO/IEC Guide 37: 1995

Table C.1 shows the technical differences and their causes between the present part and ISO/IEC Guide 37: 1995

Table C.1 Technical Differences and Their Causes between the Present Part and ISO/IEC Guide 37: 1995

Present Part Number	Technical differences	Causes
Introduction	Removing the ISO/IEC Introduction	The information in the ISO-IEC Introduction has been included in the sections on “Terminology and Definitions” and “Scope” in this part, and there is no need for repetition.
1.3	Adding an explanation of the function of Appendix A in evaluating the instructions and its use for management.	Explains how Appendix A is to be used.
3.2	Adding that the instructions are intended to convey “basic and specific information about the functions of the product” to the user.	Makes the definitions more accurate and complete.
	Revising some of the phrases in the original standard.	Complies with provisions on the composition of compulsory standards and the regulations in GB/T1.1-2000.
4.4	This information was in 4.7 of the original standard.	The information in this clause is related to that in 4.3.
4.5, 4.6	Combining the similar provisions in these two clauses.	Adds clarity and ease of use for the user.
4.9	Adding “the product packaging, when	In some cases the date of manufacture is

	given to the consumer, should also clearly state the date of manufacture, the warranty period (or expiry date) which can easily be seen” to the clause.	printed on the product packaging whereas the warranty period or the expiry date is printed on the product itself or on the inside of the box. In other cases the date is not printed clearly, making it very difficult for the user to see or read.
4.10	Adding the requirement that the manufacturer’s name and address and the product standard number must be clearly labelled.	Complies with relevant national laws.
4.13	Adding provisions for instructions of small products and packaging.	Complies with relevant national laws.
8.1.2	Adding the requirement to identify the model number used by the consumer.	To avoid confusion over consumer model numbers.
8.2.1.1, 8.2.1.2	Adding provisions governing the height of Chinese characters.	Satisfies requirements governing Chinese instructions.
8.3.3	There should also be written instructions or other means of description.	Facilitating understanding and implementation.
8.5.3	Revising the examples.	Facilitating understanding.
8.6.1	Adding provisions for Chinese instructions and their positioning.	Many imported products only provide instructions in foreign languages, or have the Chinese instructions after other languages, making it difficult for the Chinese readers.
8.6.3	Adding requirements for Chinese instructions.	Deals with a situation where the Chinese instructions are not standardised, making it easier for consumers.
8.6.4	Revising and supplementing regulations governing graphics in foreign languages.	The original regulations could occasionally give rise to confusions. When a graphic lacks any annotation it would be convenient to just write in a translation of

		<p>the foreign language. In cases where the graphic is annotated, however, it could sometimes make the graphic difficult to understand due to the absence of the translation. These new regulations make it easier for the consumer to understand the instructions.</p>
13	Adding provisions governing the layout of the instructions.	
Reference materials	Adding reference materials.	Reference materials for the user if they want to find out more about the documents that the revisions have referred to.

Reference Materials

- 1) Product Quality Law of The People's Republic of China, revised Sept. 1, 2000
- 2) Provisions on Indicating Product Identification, General Administration of Quality Supervision, Inspection and Quarantine, Nov. 07, 1997
- 3) Product information for consumers in GB/T ×××××-2008 (ISO/IEC Guide 14 IDT)
- 4) GB 7718-2004 General standard for the labelling of pre-packaged food
- 5) GE/T 20000.4-2003 Standardised work guidelines – Part 4: Safety aspects: guidelines for their inclusion in standards (ISO/IEC Guide 51: 1999 MOD)
- 6) Regulations governing the use of Chinese characters in publications, General Administration of Press and Publication
- 7) Law of the People's Republic of China on the Standard Spoken and Written Chinese Language