WELCOME
TO TODAY'S WEBINAR

Webinar for standard drafters: Checklist for writers & editors of documents

We start at 10:00 CEST

Els SOMERS

Project Manager

CEN-CENELEC Management Centre

Use the Q&A panel to submit your questions

Follow us on Twitter @Standards4EU

Your speakers today

Amy Jayne CONLEY
Project Manager - Energy & Living
Standardization & Digital Solutions

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Project Manager – Mobility
Standardization & Digital Solutions

Webinar for standard drafters: Checklist for writers & editors of documents

Contents

▲ Checklist from IR3
– key points +
explanations

▲ Brief tips for standards
drafters of homegrown
documents
- Things to remember

▲ Q&A

CEN CENELEC

Internal
Regulations
Part 3

**Principles and rules for the
structure and drafting of CEN
and CENELEC documents
(ISO/IEC Directives —
Part 2:2016, modified)**

February 2017

Checklist contained in Annex A of Internal Regulations – Part 3

Annex A
(informative)

Checklist for writers and editors of documents

The following checklist is a tool to help writers and editors of documents.

Task	Assessment	Done ☑	Comments
Structure	Check table of contents: Is the top-level structure logical? Is the subdivision consistent? Hanging paragraphs: Check for and remove any hanging paragraphs.		
Use of plain language	Is the text clear and concise?		
	Are the sentences short? (check punctuation)		
Title	Is the title organized going from the more general to the more particular?		
	Does the title unintentionally limit the scope of the document?		
	Is it as clear and concise as possible?		
	Make sure that the title does not contain more than three elements.		
	If there are several parts, are the titles aligned?		
Foreword	Is the document a revision? If so, insert a revision statement including any amendments and technical corrigenda and a list of changes with respect to previous edition.		
	Are there any other organizations involved in the drafting that should be mentioned?		
Introduction	Is it purely informative?		
	Does it describe the content or give information on why the document is needed?		
Scope	Does it describe what the document does?		
	Does it state where it is applicable?		
	Does it only contain statements of fact?		
Normative references	Normative references clause: are all the references cited in the text actually normative?		
	Are the references dated or undated?		
	Are the references used ISO and IEC standards? If not, do suitable ISO and IEC standards exist which could be used instead?		
	Are the normative references publicly available?		
	References cited in a normative manner in the text: are all such references listed in Clause 2?		
Terms and definitions	Are the terms listed used in the document?		
	Do suitable terms exist in the terminology databases? – http://www.electropedia.org/ – http://www.iso.org/obp		
	Are the definitions correctly drafted?		

Follows the structure of a CEN-CENELEC deliverable whilst mentioning drafting aspects to be checked

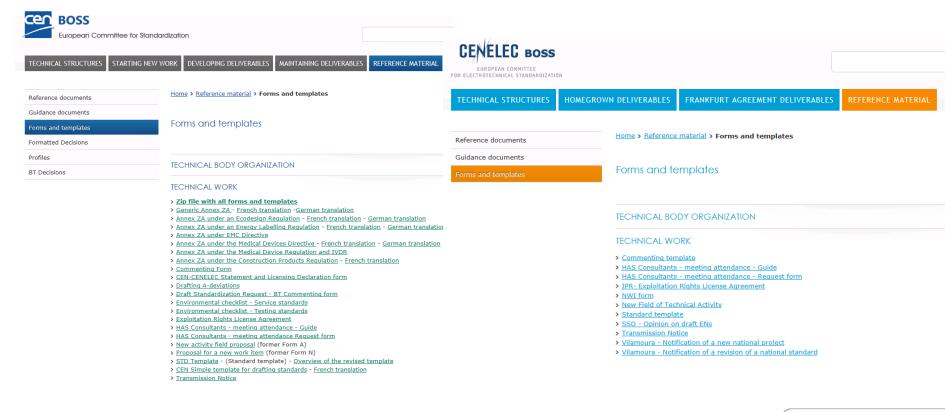| Task	Assessment	Done ☑	Comments
Figures	Does each figure have a concise title?		
	Is each figure numbered correctly?		
	Is there a key if necessary?		
	Are all figures cross-referenced in the text?		
Graphical symbols	Are symbols used taken from the ISO and IEC databases?		
	If not, contact IEC TC 3, IEC SC 3C and ISO/TC 145 in order to register a standardized symbol.		
Tables	Does each table have a concise title?		
	Is each table numbered correctly?		
	Are all tables cross-referenced in the text?		
Annexes	Is there a reference to each annex in the main part of the text?		
	Is their status (normative or informative) correct? Is this made clear in the main part of the text?		
Bibliography	Is it formatted consistently?		
	Are all the entries correct and complete?		
	Are any of them normative references that should be listed in Clause 2?		
	Are any of the listed documents duplicated in Clause 2?		
Drafting of provisions	Make sure that "shall", "should" or "may" are not used in the foreword, Scope or notes.		
	Make sure that "shall", is not used in the Introduction.		
	Are "may" and "can" used correctly?		
	Is "must" used anywhere in the document? Is "must" used correctly to mean external constraints?		
	Make sure that no requirements specifying compliance with national/legal regulations are included.		
Potential legal problems	Copyrights		
	Trademarks		
	Patents		
Conformity assessment	Are there potential conformity assessment issues?		
Cross-references	Are all cross-references correct?		
Common problems	Are symbols for variable quantities correctly formatted in the text and mathematical formulae?		
	Is a comma on the line used as the decimal sign?		
Other issues			

Structure & Use of plain language (1)

Please use the simplified templates available on CEN BOSS & CENELEC BOSS

Structure & Use of plain language (2)

Structure	Check table of contents:
	
	   Is the top-level structure logical?
	
	   Is the subdivision consistent?		

	Hanging paragraphs: Check for and remove any hanging paragraphs.		
Use of plain language	Is the text clear and concise?		
	Are the sentences short? (check punctuation)		

◤ Avoid hanging paragraphs, i.e.:

5   Uncertainty of the certified value

The combined expanded uncertainty of the measurement is calculated… — hanging paragraph

5.1   Budget of uncertainty

[…]

❌

5   Uncertainty of the certified value

5.1   General

The combined expanded uncertainty of the measurement is calculated…

5.2   Budget of uncertainty

✔

Title

Title	Is the title organized going from the more general to the more particular?		
	Does the title unintentionally limit the scope of the document?		
	Is it as clear and concise as possible?		
	Make sure that the title does not contain more than three elements.		
	If there are several parts, are the titles aligned?		

◢ Has to be clear and concise

◢ Will distinguish the subject matter from that of other documents

◢ Composed of separate elements – with the introductory element being common to the various parts if any

Foreword	Is the document a revision? If so, insert a revision statement including any amendments and technical corrigenda and a list of changes with respect to previous edition.		
	Are there any other organizations involved in the drafting that should be mentioned?		

- In case of revision, includes superseding info & list of technical changes

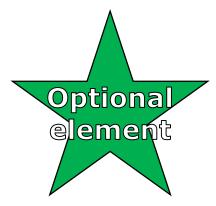- Shall not include: requirements, permissions or recommendations

Mandatory element

Introduction

Introduction	Is it purely informative?		
	Does it describe the content or give information on why the document is needed?		

Optional element

- Describes the content
- Explain why the standard is needed
- Shall not include requirements
- Required if you have patent rights

Scope

Scope	Does it describe what the document does?		
	Does it state where it is applicable?		
	Does it only contain statements of fact?		

Mandatory element

▲ Gives a summary of the subject & limits of applicability of the deliverable

▲ Gives series of statements of fact

▲ Shall not include: requirements, permissions or recommendations

"This European Standard....

o ...establishes

o ...specifies

o ...gives guidelines for

o ...defines"

"This European Standard...

o ...is applicable to..."

Normative references (1)

Normative references	Normative references clause: are all the references cited in the text actually normative?		
	Are the references dated or undated?		
	Are the references used ISO and IEC standards? If not, do suitable ISO and IEC standards exist which could be used instead?		
	Are the normative references publicly available?		
	References cited in a normative manner in the text: are all such references listed in Clause 2?		

Mandatory element

◤ Introductory paragraph:

> 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.

◤ It lists the documents that are normatively cited in the text

◤ Needs to be mentioned even if empty:

> There are no normative references in this document.

This is new in the IR – Part 3!!!

If references to non-international or European Standards, we need a TC decision

writers & editors of documents

Normative references (2)

◢ What does "Normatively Cited" mean?

- **Normative**

  Connectors **shall** conform to the electrical characteristics specified by EN 60603-7-1.

- **Informative**

  Connectors **should** conform to the electrical characteristics specified by EN 60603-7-1.

◢ Make sure they're actually cited normatively in the text!

◢ For more modal verbs expressing requirements, See IR3, Table 3

Normative references (3)

When should my reference be dated?

▲ If there is a reference to a specific (sub)clause, figure, table, equation… of the Standard → date the reference → dated

> **Example:**
> Pipes shall comply with the requirements given in EN 1780:2015, 8.4.

▲ If there is a reference to whole document → not dated

▲ If dated, refer to the latest edition

▲ Remember: if dated in the text, date also in Clause 2 !

▲ Will be either EN or prENs

▲ No FprEN, withdrawn, abandoned, 'in the pipeline' or closed standards

References to be fully active, available and up-to-date

of documents

Terms and definitions

Terms and definitions	Are the terms listed used in the document?		
	Do suitable terms exist in the terminology databases? – http://www.electropedia.org/ – http://www.iso.org/obp		
	Are the definitions correctly drafted?		

Mandatory element

▲ Gives definitions to some terms used in the document, to facilitate understanding

▲ Introductory text:

> For the purposes of this document, the following terms and definitions apply.
>
> ISO and IEC 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

▲ Needs to be mentioned even if empty:

> No terms and definitions are listed in this document.
>
> ISO and IEC 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

This is new in the IR – Part 3!!!

Figures (1)

Figures	Does each figure have a concise title?		
	Is each figure numbered correctly?		
	Is there a key if necessary?		
	Are all figures cross-referenced in the text?		

◢ Are needed to present the information more clearly

◢ Figures to be a separate folder (CEN only) as .tif or .eps

◢ Naming of files:
  - ◢ Figures in text: 001, 002, OR Fig_1, Fig_2 etc
  - ◢ Subfigures: 001a, 001b OR Fig_1a, Fig_1b etc
  - ◢ Figures in Annexes: a001, b001, etc
  - ◢ Figs in tables? 1st figure in table 1 = Tbl_1_1
  - ◢ Figs in key? Key of figure 1 = 001_1 OR Fig_1_1

◢ Figures shall be language neutral

◢ Resolution 600 dpi, LZW compression and sizing 100%

◢ In the text, Figures to be numbered continuously, starting at 1

◢ Key to a Figure to draft separately, preferable in a table

Figures (2)

CEN – obligatory to provide all figure files with document at time of transmission (no figures, text likely to be rejected)

CENELEC – not obligatory but VERY helpful!

▲ If we don't have the figure files -> the quality may be poor and we may have to contact the TC

▲ Subfigures need a key? 1 single key for ALL subfigures combined!

▲ One key not possible? Please use separate figures in the text.

▲ Do not provide figures to replace an entire table! Tables shall be editable and not be figures!

Mandatory element

Pay attention to quality of figures. If unsure, contact us!

Check your quality!

▲ You can use Projex-Online to check the quality of your figures before you submit:

▲ Projex-Online is a password protected application available for CEN & CENELEC members organizations and CEN & CENELEC TC secretaries

Graphical symbols

Graphical symbols	Are symbols used taken from the ISO and IEC databases? If not, contact IEC TC 3, IEC SC 3C and ISO/TC 145 in order to register a standardized symbol.		

- ▲ When the TC is aware that a graphical symbol with a specific meaning is already registered in ISO, it should quote this in its standard
  - ▲ This can be done in the title of the symbol
- ▲ To be identified as figures and followed with their reference number
- ▲ To ensure a proper use of graphical symbols, please contact ISO/TC 145

**Unsure?
Contact us!**

Tables	Does each table have a concise title?		
	Is each table numbered correctly?		
	Are all tables cross-referenced in the text?		

▲Titles - concise, simple, easy to understand

▲Correct numbering – one table, one number – no subtables

　　▲Example:　　**Table 1 — Protection class requirements**

▲Cross-referencing – is it mentioned in the text?

▲Simply drafted

　　▲No diagonal lines

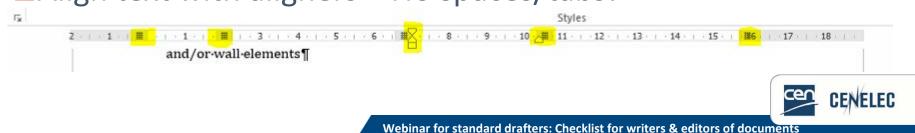　　▲Avoid merging/splitting cells

▲No images as tables!

Tables (2)

▲No nested tables!

Table 1 — Protection class requirements

Protection class	Container test and floor test		Impact test	Comparison tests	
	Maximum temperature increase	Maximum relative humidity		Maximum temperature increase	Maximum relative humidity
			Nested table		
			X | X		
			X | X		
Type A	50°C	85 %		100°C	85 %
Type B	50°C	85 %	Integrity to 3.1.10 and 10.4.5	100°C	85 %
Type C	50°C	85 %	Integrity to 3.1.10 and 10.4.5	100°C	85 %

▲Draft tables simply

▲landscape is possible to fit information in!

▲Align text with aligners – No spaces/tabs!

and/or·wall·elements¶

Annexes

Annexes	Is there a reference to each annex in the main part of the text?		
	Is their status (normative or informative) correct? Is this made clear in the main part of the text?		

- **Normative or Informative**
  - No requirements allowed in Informative annexes
- **In-text citation?**
  - (See Annex A) Informative reference
  - …according to Annex B. Normative reference
- **No need to order them in the order they appear in the text (IR3 clause reference)**

This is new in the IR – Part 3!!!

Bibliography	Is it formatted consistently?		
	Are all the entries correct and complete?		
	Are any of them normative references that should be listed in Clause 2?		
	Are any of the listed documents duplicated in Clause 2?		

Informative element – no normative references

Formatted consistently?

- Either everything numbered OR nothing numbered
- EN –> ISO/IEC –> External –> Books –> Legal

Entries correct and complete?

Any duplicate references found in Clause 2?

Drafting of provisions (1)

Drafting of provisions	Make sure that "shall", "should" or "may" are not used in the foreword, Scope or notes.		
	Make sure that "shall", is not used in the Introduction.		
	Are "may" and "can" used correctly?		
	Is "must" used anywhere in the document? Is "must" used correctly to mean external constraints?		
	Make sure that no requirements specifying compliance with national/legal regulations are included.		

◢ European Foreword/Scope/Notes:

  ◢ no shall, should or may

◢ Introduction – no "shall"

◢ 'May' (permission) and 'can' (statement of fact) used correctly?

Drafting of provisions (2)

▲ Must used only as external constraint?

  ◢ No use of 'must' for 'shall' (Table 7, IR3)

Table 7 – External constraint

Verbal form	Equivalent phrases or expressions for use in certain cases
must	

EXAMPLE 1   A legal requirement:

European legislation states that opaque eye protection must be worn in these environments.

EXAMPLE 2   A law of nature:

diadromous
fish that must obligatorily migrate between freshwater and seawater to complete its life cycle

Do not use "must" as an alternative for "shall". (This will avoid any confusion between the requirements of a document and external constraints – see 7.2).

▲ No requirements specifying compliance with national/legal regulations?

▲ No "informative" parts can have requirements or normative elements

Drafting of provisions (3)

Table 3 – Requirement

Verbal form	Equivalent phrases or expressions for use in certain cases
shall	is to
	is required to
	it is required that
	has to
	only … is permitted
	it is necessary
	needs to
shall not	is not allowed [permitted] [acceptable] [permissible]
	is required to be not
	is required that … be not
	is not to be
	need not
	do not

Table 4 – Recommendation

Verbal form	Equivalent phrases or expressions for use in certain cases
should	it is recommended that
	ought to
should not	it is not recommended that
	ought not to

Table 5 – Permission

Verbal form	Equivalent phrases or expressions for use in certain cases
may	is permitted
	is allowed
	is permissible
need not	it is not required that
	no … is required

Table 6 – Possibility and capability

Verbal form	Equivalent phrases or expressions for use in certain cases
can	be able to
	there is a possibility of
	it is possible to
cannot	be unable to
	there is no possibility of
	it is not possible to

Potential legal problems	Copyrights		
	Trademarks		
	Patents		

▲**Copyright information** (Clause 32, IR3)

    ▲See Internal Regulations Part 1, clauses 4.2 and 6.4

    ▲See CEN/CENELEC Guide 10

▲**Trademarks** (Clause 26.6, IR3)

    ▲Try to avoid using specific products

    ▲Not possible? Footnote information:

C.1.1 Introduction

...multiplex real-time PCR method based on TaqMan.®[7].

----

[7] TaqMan ® is a trademark of Roche Molecular Systems. This information is given for the convenience of users of this standard and does not constitute an endorsement by ISO of the product named. Equivalent products may be used if they can be shown to lead to the same results.

Potential legal problems (2)

◢Patents

- ◢ Introduction – obligatory
- ◢ No patents sentence in European Foreword at publication:

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

◢Registration of patent form

- ◢ CEN/CENELEC Guide 8
- ◢ Form to be completed and submitted ASAP by TC
- ◢ No form – no publication

Conformity Assessment

Conformity assessment	Are there potential conformity assessment issues?		

▲Are all problems solved before submitting?

▲Contact with CEN/CLC/JTC 1?

  ▲Future webinar – 6 November 2018:

    ▲ https://www.cencenelec.eu/aboutus/ourservices/training/webinarstddrafters/pages/default.aspx

  ▲More information – CEN BOSS/CENELEC BOSS:

▲https://boss.cen.eu/reference%20material/guidancedoc/pages/confassess.aspx

▲https://boss.cenelec.eu/Pages/resultsearch.aspx?k=Conformity%20assessment

Webinar for standard drafters: Checklist for writers & editors of documents

Cross-references

Cross-references	Are all cross-references correct?		

▲ All references in text are correct?

  ▲ Ensure referenced clauses actually exist

▲ References to tables/figures/annexes are correct?

▲ No field codes or auto-numbers used?

  ▲ Causes problems with XML processing

▲ Cross-references to external documents correct?

Tips for Standards Drafters

Brief overview and things to remember

▲Specifically:

   ▲No EU regulations/directives/legal texts

   ▲They will be changed out:

...the dimensions of pipes shall be according to Directive 2009/29/EC...

...the dimensions of pipes should be according to Directive 2009/29/EC...

...for more information on the dimensions of pipes, see Directive 2009/29/EC...

Formulae

- Where possible, draft in **MathType**
  - MathType unavailable? Consider downloading.
  - Still not convinced? Draft in the Equation tool in Word and we will convert them

    Be aware – poorer quality, potential for problems – editors are not technical experts!

  - Not to lay out formulae in tables – use a tab.

- **Pay close attention to correctness** at ENQ and FV stage – we cannot change formulae at Publication stage (discussed further later on).

Publication issues (1)

▲ **What do we mean by a technical change?**

  ◢ Something which changes the technical content of the standard

  ◢ Something which changes the scope or parameter of a requirement

  ◢ Something which adds or removes a requirement

FR10¤					As·written·in·§4·IT-Security· topic·is·out·of·the·scope·of·the· requirements·given·in·this· standard.·So,·it·is·not·possible· to·have·"shall"·requiring· activities·on·this·topic·in·§5.¤		¤	¤
	¤	6.4¤	§5¤	E¤		Replace·the·two·"shall"·by· "can".¤		¤
FR11¤					As·written·in·§4·IT-Security· topic·is·out·of·the·scope·of·the· requirements·given·in·this· standard.·So,·it·is·not·possible· to·have·a·"shall"·requiring·to· integrate·Security·topic·in·the· Safety·Case.¤		¤	¤
	¤	6.4¤	§6¤	E¤		Replace·"shall"·by·"can".¤		¤

▲Why can't we make these changes?

  ▲Text is approved as it is by members as a whole. To make this change = less transparency

  ▲Imagine: text is agreed, but one member wishes to amend a requirement. We make the change but no-one else has a say. Unfair, not transparent!

Your editor isn't saying you're wrong – we're not technical experts!

▲ What changes **can** we make?

MB/¶ NC¤	Line¶ number¤	Clause/¶ Subclause¤	Paragraph/¶ Figure/¶ Table¤	Type of¶ comment¤	Comments¤	Proposed change¤	Observations of CCMC on each comment submitted¤	Observations of the secretariat on each comment submitted¤
NO¤	¤	6.2.1¤	¤	ed¤	Wrong use of commas¤	Delete the commas in the sentence "a) complete pre-existing systems, that perform one or more safety-related functions, and were developed in accordance with other safety standards¤	Comment accepted and implemented.¤	¤
NO¤	¤	6.3¤	¤	ed¤	Wrong font size in "- Testing has a sufficiently … the tool."¤	Correct the font size¤	¤	¤
NO¤	¤	7.2¤	¤	ed¤	Wrong indentation in the dash points following the paragraph "For safety-related Basic Integrity functions …"¤	Correct the indentation (perhaps a formatting problem when converting the document to PDF)¤	¤	¤

No resubmissions of texts

DECISION BT 17/2018: No more resubmissions at Enquiry and Formal Vote stages : this is applicable for all documents delivered to CCMC as of 2018-04-30

▲ First delivery (the draft you send) OR Second deliver (the draft we send to translation)

▲ Publication:

  ▲ Resubmissions to translators – OK

  ▲ Expect a delay of 2 weeks if a resubmission is requested

Final words
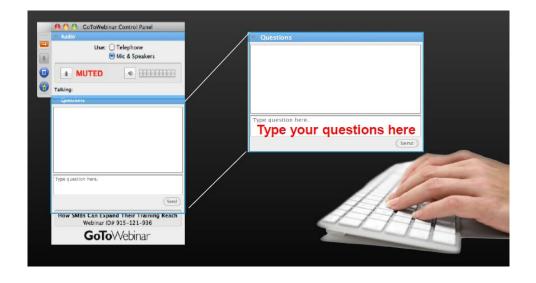
▲Pay attention to your draft!

▲If unsure about ANY aspect of the drafting procedure, contact your editor!

▲The TC does not need to be the one to contact us – we are happy to speak directly to working groups and drafters

▲Editor meetings are free – and very useful! We can join you via skype, GoToMeeting, in person, via telephone.

▲If you notice a drafting issue while your document is at enquiry or formal vote, even translation, let us know **BEFORE PUBLICATION**. We can make any change to the text before publication, but only if we know!

▲Any editor is able to help – don't wait until you submit your draft to ask us your questions! If you have the contact details of an editor, get in touch and ask them!

Question time

Use the Q&A panel to submit your questions

THANK YOU FOR YOUR PARTICIPATION

Webinar for standard drafters: Checklist for Writers & Editors of Documents

Next webinar for standard drafters:
6th November 2018 – Conformity Assessment
More information will follow via email and the website

www.cencenelec.eu

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