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Standard Guide for Integration of Ergonomics/Human Factors into New Occupational Systems¹

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1. Scope*

1.1 This guide is intended to assist in the integration of ergonomic principles into the design and planning of new occupational systems from the earliest design stages through implementation. Doing so may reduce or eliminate the necessity for later redesign that could have been foreseen.

1.2 *This standard does not purport to address all of the safety concerns, if any, associated with its use. It is the responsibility of the user of this standard to establish appropriate safety, health, and environmental practices and determine the applicability of regulatory limitations prior to use.*

1.3 *This international standard was developed in accordance with internationally recognized principles on standardization established in the Decision on Principles for the Development of International Standards, Guides and Recommendations issued by the World Trade Organization Technical Barriers to Trade (TBT) Committee.*

2. Referenced Documents

2.1 ASTM Standards:²

E1542 Terminology Relating to Occupational Health and Safety

3. Terminology

3.1 For definitions not in this standard related to this guide, refer to Terminology E1542.

3.2 Definitions:

3.2.1 *administrative controls, n*—work practices and policies that are implemented with the objective of enhancing human well-being and overall system performance through the way work is assigned or scheduled.

¹ This guide is under the jurisdiction of ASTM Committee E34 on Occupational Health and Safety and is the direct responsibility of Subcommittee E34.80 on Industrial Health.

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² For referenced ASTM standards, visit the ASTM website, www.astm.org, or contact ASTM Customer Service at www.astm.org/contact. For *Annual Book of ASTM Standards* volume information, refer to the standard's Document Summary page on the ASTM website.

3.2.1.1 *Discussion*—Examples may be found in Appendix X1.

3.2.2 *benchmarking, v*—identifying of best practices against which to compare the effectiveness of a process or design.

3.2.2.1 *Discussion*—Examples may be found in Appendix X1.

3.2.3 *business outcome, n*—required products or services or both, that is, the desired and essential qualities and quantities of the end product of the occupational system.

3.2.4 *design team, n*—departments or individuals or both involved in or consulted during the design process, including representatives of those who are involved or affected by the design.

3.2.4.1 *Discussion*—Examples may be found in Appendix X1.

3.2.5 *engineering controls, n*—in ergonomics/human factors, physical changes to jobs that are implemented with the objective of enhancing human well-being and overall system performance through the design and modification of the work equipment, facilities, or processes, or combination thereof.

3.2.5.1 *Discussion*—Examples may be found in Appendix X1.

3.2.6 *ergonomics/human factors, n*—scientific discipline concerned with the understanding of interactions among humans and other elements of a system and the profession that applies theory, principles, data, and methods to design to optimize human well-being and overall system performance.

(International Ergonomics Society)

3.2.7 *job, n*—set of tasks performed by one or more workers.

3.2.8 *knowledge base, n*—organized body of information applicable to the integration of ergonomics into new occupational systems, including both general ergonomic resources, such as those found in the bibliography, and the experiences of the organization.

3.2.8.1 *general knowledge base, n*—ergonomic textbooks, guidelines, recommendations, reports of other companies' ergonomic programs, and so forth.

3.2.8.2 *internal knowledge base, n*—organized account of the organization's positive and negative experiences with occupational processes.

*A Summary of Changes section appears at the end of this standard

3.2.8.3 *project knowledge base*, *n*—working collection of experiences for the current project in which decisions made at each stage are added to the project knowledge base for use at later design stages, and after the completion of a project, the project knowledge base is integrated into the internal knowledge base.

3.2.9 *occupational ergonomic risk analysis*, *n*—assessment of occupational ergonomic factors including, but not limited to, the evaluation of force (including dynamic motion), repetition, awkward or static postures, contact stress, vibration, and physiologic environmental factors such as temperature and other ambient air conditions.

3.2.9.1 *Discussion*—Occupational risks can be affected by workers' lifestyles and other nonoccupational risk elements.

3.2.10 *occupational system*, *n*—integrated collection of personnel, facilities, equipment, tools, raw materials, techniques, and other resources organized to produce a product or service.

3.2.11 *task*, *n*—group of related activities that comprises a component of a job.

3.2.12 *workers' capabilities and limitations*, *n*—those personal characteristics that workers bring to a job, such as:

Physical strength, endurance, agility, and skill and
Mental abilities, techniques, and knowledge developed through training, experience, and education.

3.2.12.1 *Discussion*—Examples may be found in [Appendix X1](#).

4. Summary of Guide

4.1 This guide facilitates the integration of ergonomic principles into the design of occupational systems. It is assumed that there will be more than one iteration of the process, proceeding from the general and becoming more detailed with each iteration. The number of iterations will depend on the complexity of the process.

4.2 The evaluation begins by defining the business outcome, that is, the essential qualities and quantities of the end product or service.

4.3 After identifying the required process elements (physical and operational components), tasks are allocated to machines or workers.

4.4 The jobs are then analyzed to determine if they exceed worker capabilities and limitations.

4.5 Depending on the results of the analysis, the business outcome or jobs may be modified or action deferred to a later iteration.

4.6 Throughout the process, the knowledge gained is added to the knowledge base.

4.7 The operational audit evaluates the system as the design nears completion. It identifies and evaluates those issues either not considered or not apparent in previous stages. After the system is operational, periodic audits evaluate the effectiveness of the design.

5. Significance and Use

5.1 Integrating ergonomic principles into new occupational systems may help businesses develop processes that do not exceed worker capabilities and limitations.

5.2 Jobs and tasks that conform to worker capabilities and limitations may be performed more efficiently, safely, and consistently than those that do not.

5.3 The application of ergonomic principles to the processes involved in occupational systems may help avoid system failures and inefficiencies.

5.4 The integration of ergonomic principles at the earliest stages of process concept and design may facilitate appropriate design, layout, and allocation of resources and may reduce or eliminate the necessity for later redesign that could have been foreseen.

5.5 Designing jobs that fit the capabilities of larger population segments may increase an organization's accessibility to the available labor pool.

5.6 The integration of ergonomic principles into occupational systems may increase profit by lowering direct and indirect costs associated with preventable losses, injuries, and illnesses.

5.7 The bibliography contains a list of reference materials that may be useful in particular applications. All appendixes are nonmandatory.

6. Getting Started (see [Fig. 1](#))

6.1 *Design Team*—Identify the departments or individuals or both who should be on the design team or consulted during the design process. They include representatives of those who are involved or affected by the design. Design team members may include representatives from engineering, labor, maintenance, marketing, vendors, safety and health professionals, and so forth, as appropriate.

6.2 *Allocate Responsibility*—Appoint members of the design team to be responsible for maintaining the knowledge bases, benchmarking, and the scheduling and performing of periodic audits.

6.3 *Business Outcome*—Determine the desired and essential attributes of the end product or service of the occupational system. The essential attributes of the end product or service determine what can and cannot be altered during the design process. They may include:

- 6.3.1 Manufacturing and assembly items,
- 6.3.2 Services to be provided,
- 6.3.3 Material to be delivered to the customer,
- 6.3.4 Specifications and acceptable tolerances,
- 6.3.5 Quality levels (allowable percentage of defects), and
- 6.3.6 The quantity of the product to be produced, including projections of future requirements.

6.4 *Knowledge Base*—Establish a knowledge base. Once a formal knowledge base exists, it will be used as a resource for the design project. Because experience gained during each project will be added to the knowledge base, it will grow and become essential to the design process. It includes the general,