

# Instructions

Best practices

## Planning

When planning, first gain a thorough grasp of your subject, your readers, and their needs. A good way to start is to answer the Five-W and How Questions:

*Who might use this documentation?*

*Why is this documentation needed?*

*What should the documentation include?*

*Where will the documentation be used?*

*When will the documentation be used?*

*How will this documentation be used?*

Once you have answered these questions, you are ready to define the rhetorical situation that will shape how you write the text.

# Outline

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- Introduction
- Description of equipment
- List of materials/tools needed
- Directions
  - Sequentially ordered steps
  - Tips (shortcuts) – not required
  - Graphics
  - Safety information
- Troubleshooting
- Conclusion that signals completion of task

# Introduction

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- ⦿ What will these instructions help me do?
- ⦿ Do I really have to read this?
- ⦿ Is there anything special I need to know?

**PURPOSE** Take a moment to consider and compose your purpose statement, limiting yourself to one sentence. Some key verbs for the purpose statement might include the following:

*to instruct*

*to guide*

*to show*

*to lead*

*to illustrate*

*to direct*

*to explain*

*to train*

*to teach*

*to tutor*

For example, here are a few purpose statements that might be used in a set of instructions:

The purpose of these instructions is to show you how to use your new QuickTake i700 digital video camera.

These procedures will demonstrate the suturing required to complete and close up a knee operation.

These specifications illustrate the proper use of the Series 3000 Router to trim printed circuit boards.

# Learning Styles

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## **From 5 senses to 3 modalities**

We experience the world through our senses. While we know from grade school that there are 5 senses, psychologists have distilled these into 3 “sensory modalities” relevant to learning: verbal, visual, and kinesthetic. Though everyone learns through all three modes, we each favor one over the others, resulting in three different styles of learning: Verbal, Visual, and Kinesthetic.

Source: <http://johnnyholland.org/2011/06/learning-styles-the-cognitive-side-of-content/>

# Learning Styles

***Verbal learners*** are best at absorbing written and spoken information. Since most learning is either text-based (reading a book, searching online) or auditory (a classroom lecture or personal conversation), verbal learners have ready access to content in their preferred medium.



# Learning Styles

***Visual learners***, on the other hand, digest information from charts, diagrams, timelines, maps, and other concrete images more easily than from the written or spoken word. In contrast to their verbal counterparts, visual learners are relatively underserved with appropriate content.

# Learning Styles

***Kinesthetic learners*** enjoy hands-on activities involving movement (think dancing, pottery, woodwork). While kinesthetic learning is minimally involved in desktop computing, it plays a much more significant role in gestural and mobile interfaces.

# Description of Equipment

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- If I'm working with equipment, where are the parts I need to use?
- If I'm working with software, where do I find the tools I need to use?

# List of materials/tools needed

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- What equipment, tools, materials, or other things do I need?

# Directions

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- Once I'm ready to start, what – exactly – do I do?
  - Sequentially ordered steps
  - Tips (shortcuts) – not required
  - Graphics
  - Safety information

# Directions

**USE COMMAND VOICE** Steps should be written in *command voice*, or imperative mood. To use command voice, start each step with an action verb.

1. Place the telescope in an upright position on a flat surface.
2. Plug the coil cord for the Electronic Controller into the HBX port (see Figure 5).

In most steps, the verb should come first in the sentence. This puts the action up front, while keeping the pattern of the steps consistent. The “you” in these sentences is not stated, but rather implied (“*You* place the telescope in an upright position”).

# Directions

**STATE ONE ACTION PER STEP** Each step should express only one action (Figure 7.8). You might be tempted to state two smaller actions in one step, but your readers will appreciate following each step separately.

## Ineffective

2. Place the telescope securely on its side as shown in Figure 4 and open the battery compartment by simultaneously depressing the two release latches.

## Revised

2. Place the telescope securely on its side as shown in Figure 4.
3. Open the battery compartment by simultaneously depressing the two release latches.

# Directions

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- Write for the intended audience.



# Directions

- Write for the intended audience.

## Original

To customize your settings:

1. Go to the file tree.
2. Click the **INFODIR** folder.
3. Right-click the **SETTINGS.DEF** file and select **Edit** from the menu.
4. Change the settings that you want in the file.
5. Click **File** —> **Save** to save the file.
6. Click **File** —> **Close** to close the editor.

## Revision

To customize your settings, edit the **INFODIR/SETTINGS.DEF** file.

# Directions

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- Present information from the user's point of view.

# Directions

The following passage is written from a remote, impersonal point of view:

## **Original**

The system should not be shut down during processing. If such a shutdown occurs, the system should be restarted with the START RECOVER command.

## **Revision**

If you shut down the system during processing, you might lose data. Use the START RECOVER command to restart the system and recover any data from the log.

The original passage is passive and indefinite about who does the action and why. In the revision, the information is presented to make the user an active participant. The phrase “you might lose data” expresses the reason for the action in terms that users can relate to personally—they don’t *want* to lose data.

# Directions

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- Relate details to a task when possible.

# Directions

In a task topic, facts can puzzle users if you don't indicate what **significance** the facts have, as shown in the following passage:

## **Original**

If the NORES option is used, the routines are link-edited as part of the load module. If the RES option is used, the routines are loaded separately.

## **Revision**

Use the NORES option when you have sufficient space for routines to be link-edited as part of your load module. Use the RES option to save space by loading the routines only when you need them.

# Directions

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At first glance, the following sentence appears to be only descriptive and to have no practical application:

## **Original**

The BW\_Message mapping table in the Data\_LM directory can contain warning messages that are issued by InfoProduct when you create a request.

## **Revision**

After you create a request, check the BW\_Message mapping table to see if InfoProduct issued any warning messages. The BW\_Message mapping table is in the Data\_LM directory.

# Directions

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- Focus on **real tasks**, not product functions.

Examples of real and artificial tasks are:

- ☐ Users want to edit a table, but the writer introduces this task as “using the table editor” instead of “editing a table.”
- ☐ Users want to count the records in a file, but the writer introduces the task as “using the CNTREC utility” instead of “counting records with the CNTREC utility.”



# Directions

## Original

To use the InfoInstaller utility:

1. Open the InfoInstaller window by typing `infoinst` at the command line.
2. Complete the InfoInstaller window by specifying the installation parameters.
3. Click **OK**. InfoInstaller installs InfoProduct.

The original introduction assumes that users understand the task in terms of the tool that they need to use to do the task. Although some users might know what InfoInstaller is, all users know what installation is.

## Revision

To install InfoProduct:

1. Type `infoinst` at the command line. The InfoInstaller window opens.
2. Specify the installation parameters in the window.
3. Click **OK**. InfoProduct is installed.



The following introduction shows a topic that explains how to use the product rather than how to perform real tasks:

### Original

This topic explains how to use the following menu choices under **File**:

<b>Open</b>	Opens an existing file.
<b>New</b>	Creates a file.
<b>Save as</b>	Saves to a new file with a different name.

The original text assumes that the user is examining the interface and wondering what each menu item does. This type of information is appropriate for *contextual help* (help that is relevant to where a user is in a product, such as help for the selected control), but not for a task topic. Users want information about how to do real tasks, not a list of the buttons and fields in the product interface.

### Revision

This topic explains how to work with a document. You can do the following tasks:

- ☐ Create a document
- ☐ Open an existing document
- ☐ Rename a document

# Troubleshooting

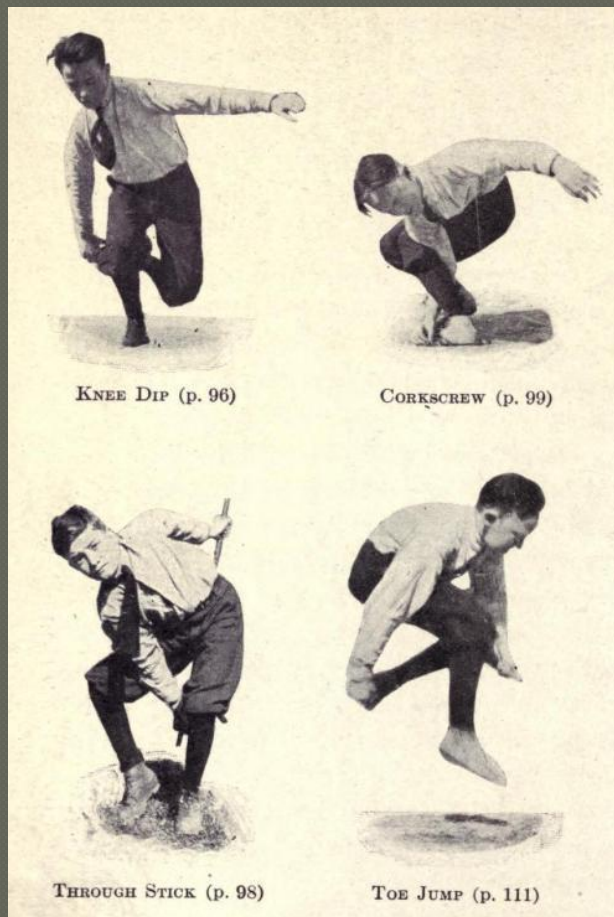
---

- Something isn't working correctly. How do I fix it?

# Conclusion

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- What should I have when I'm done?



“Page from an early twentieth-century break dancing instruction manual”

Source: <http://voiceofthemonkey.com/2011/03/21/>



KNEE DIP (p. 96)



CORKSCREW (p. 99)



THROUGH STICK (p. 98)



TOE JUMP (p. 111)



# *The* PORTABLE ELECTRIC DRILL



## — NOTE —

Please hand this book to the Operator who will  
use this Drill. Ask him to

**READ IT CAREFULLY**

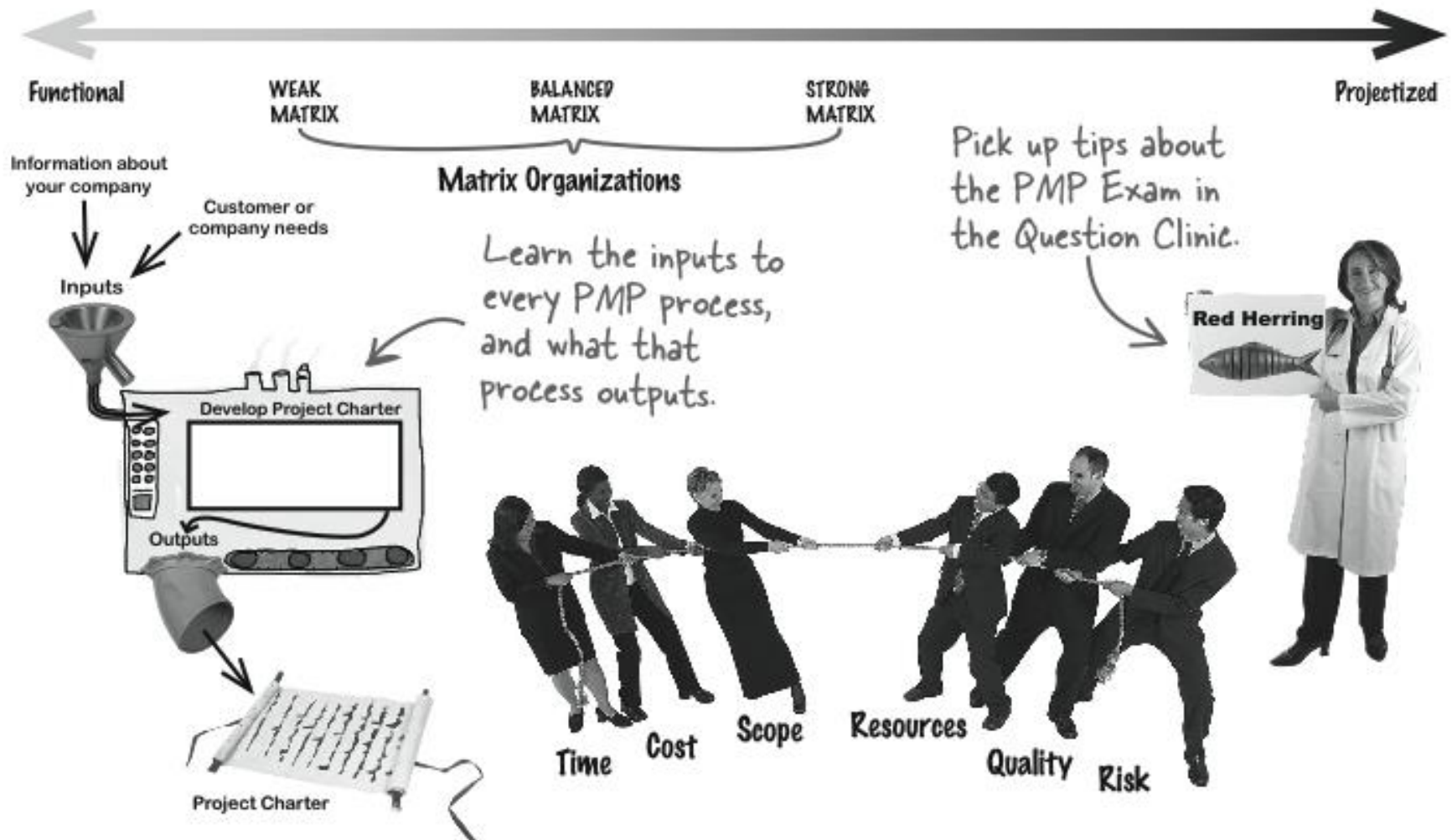
## A HANDBOOK

to increase the life and efficiency of

**Black & Decker**  
PORTABLE ELECTRIC TOOLS



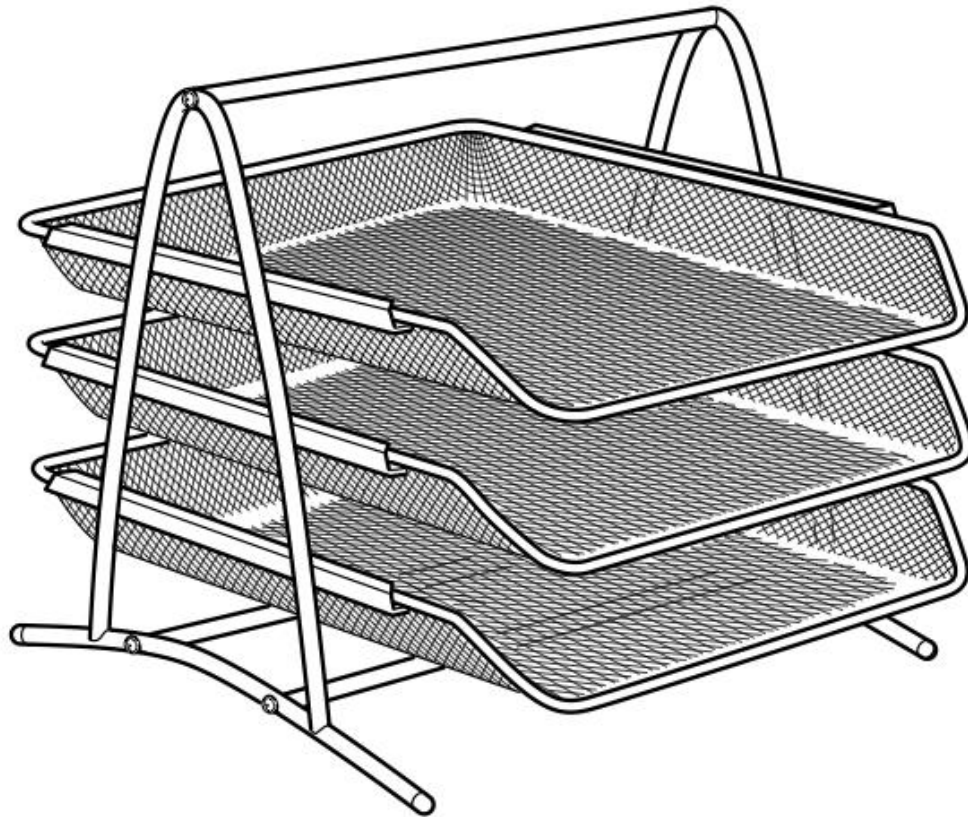


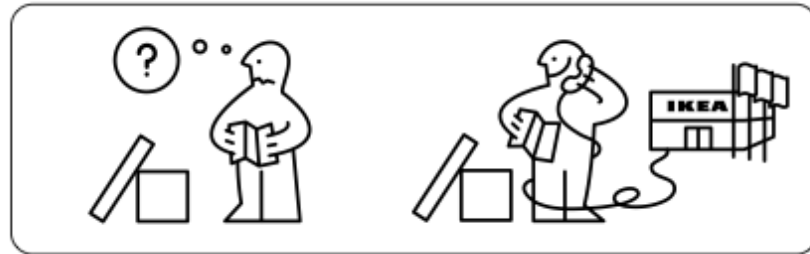
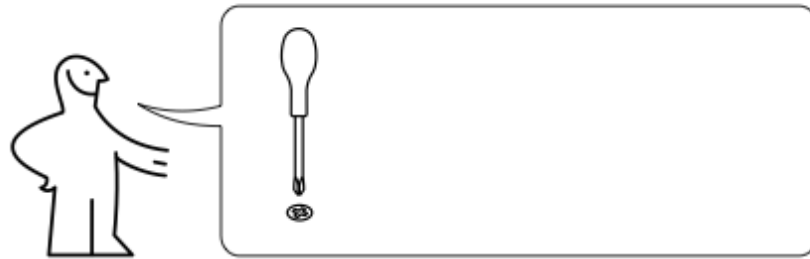


Page from Head First manual on project management techniques

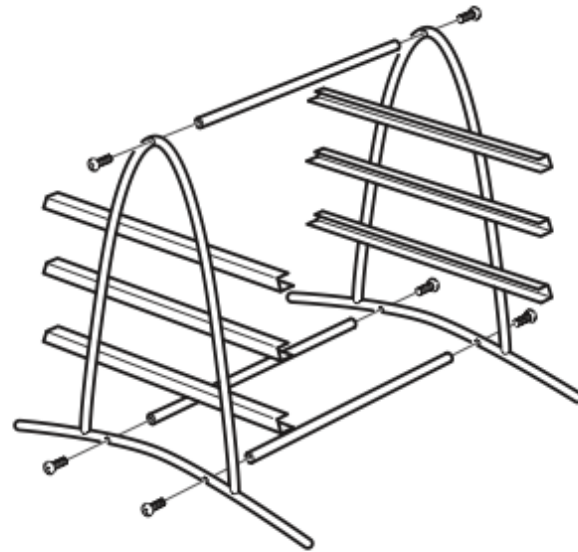


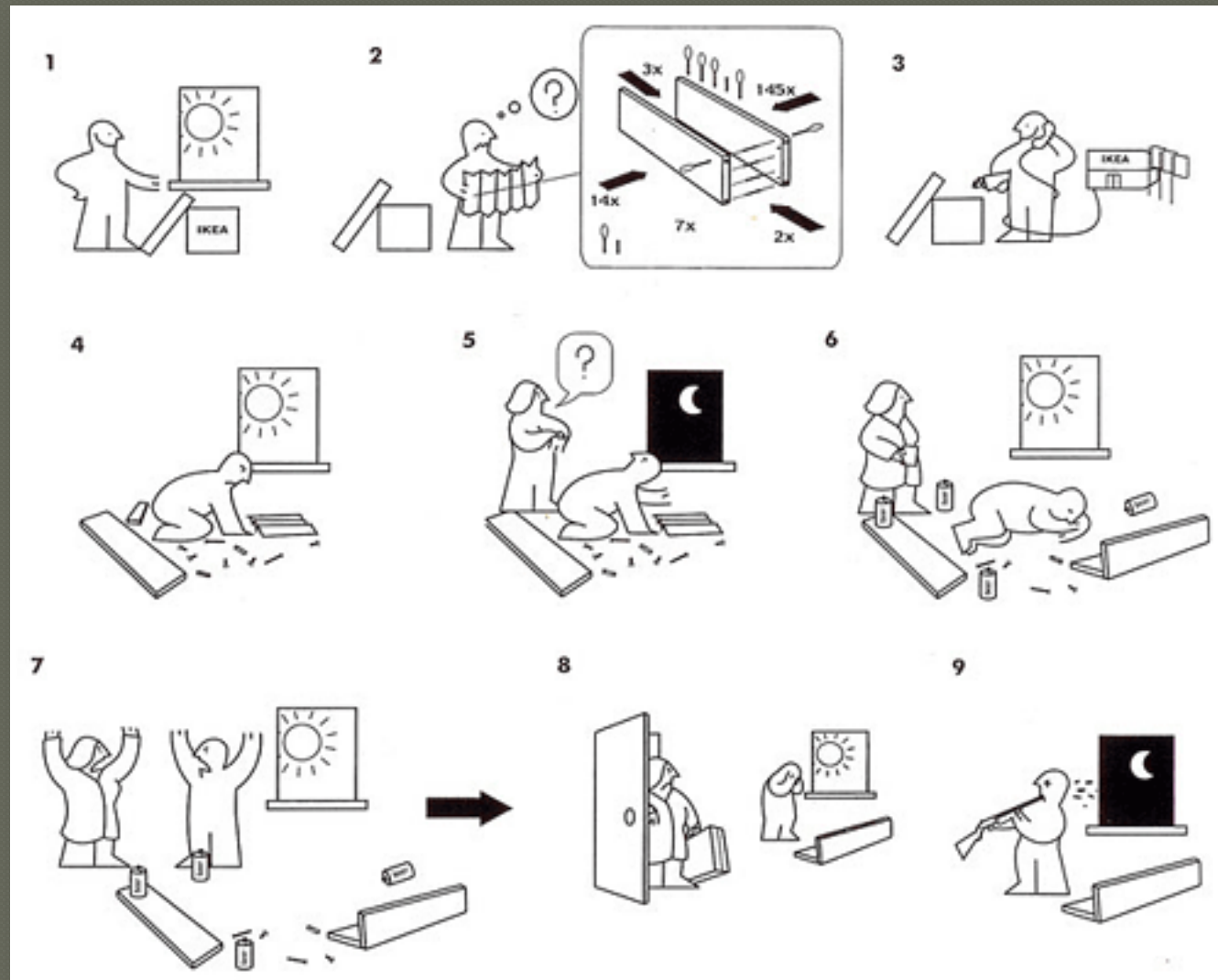
# DOKUMENT



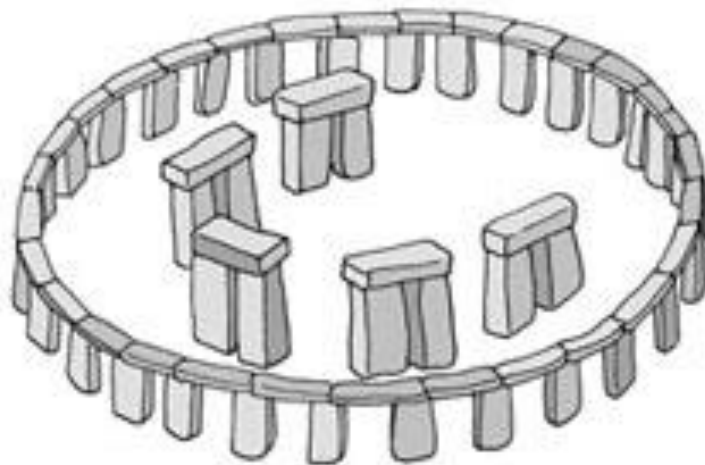


1





# HËNJ



80x



30x



30x



10x



5x



1x



3x



## A Set of Instructions

Specific and  
precise title

Brief  
introduction

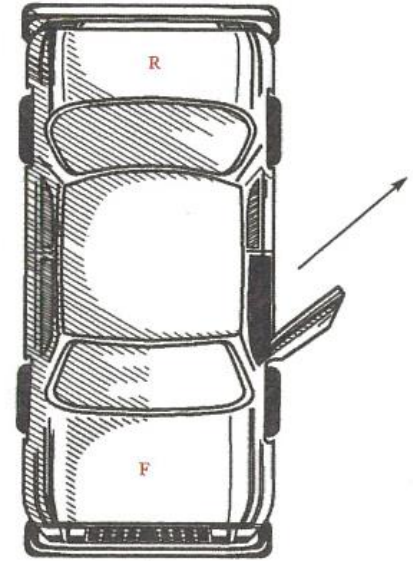
Additional  
notes to  
clarify steps

### HOW TO JUMP FROM A MOVING CAR

Hurling yourself from a moving car should be a last resort, for example if your brakes are defective and your car is about to head off a cliff or into a train.

- 1** Apply the emergency brake.  
This may not stop the car, but it might slow it down enough to make jumping safer.
- 2** Open the car door.
- 3** Make sure you jump at an angle that will take you out of the path of the car.  
Since your body will be moving at the same velocity as the car, you're going to continue to move in the direction the car is moving. If the car is going straight, try to jump at an angle that will take you away from it.
- 4** Tuck in your head and your arms and legs.
- 5** Aim for a soft landing site: grass, brush, wood chips, anything but pavement—or a tree.  
Stuntpeople wear pads and land in sandpits. You won't have this luxury, but anything that gives a bit when the body hits it will minimize injury.
- 6** Roll when you hit the ground.

82. chapter 3: leaps of faith



After you have applied the emergency brake and the car has slowed, open the car door.  
Jump out at an angle away from the direction in which the car is traveling.

83. jumping from a moving car

**Figure 7.1:**

Here is a rather simple set of instructions. Notice how the steps make up the bulk of the document.

Graphic  
visually  
reinforces  
steps.

Source: From Worst-Case Scenario Survival Handbook™ by Joshua Piven and David Borgenicht. Copyright © 1999 by Quirk Productions, Inc. Used with permission of Chronicle Books LLC, San Francisco. Visit [Chronicle Books.com](http://ChronicleBooks.com).

## A Procedure


Header shows identification number of procedure.

Title of emergency procedure

Brief introduction defines medical condition.

Steps of the procedure

Gray areas signal situations in which a doctor needs to be involved.

	<h1>EMT-Paramedic Treatment Protocol</h1> <h2>4202</h2>	
<h3>Chest Pain/Discomfort Acute Coronary Syndrome (ACS)</h3>		<h3>Page 1 of 3</h3>

A. Indications for this protocol include one or more of the following:

1. Male over 25 years of age or female over 35 years of age, complaining of substernal chest pain, pressure or discomfort unrelated to an injury.
2. History of previous ACS/AMI with recurrence of "similar" symptoms.
3. Any patient with a history of cardiac problems who experiences lightheadedness or syncope.
4. Patients of any age with suspected cocaine abuse and chest pain.

B. Perform **MAMP (4201)**.

C. Obtain 12 lead ECG, if available and causes no delay in treatment or transport.

D. If patient has no history of allergy to aspirin **and** has no signs of active bleeding (i.e., bleeding gums, bloody or tarry stools, etc.), then administer 4 (four) 81 mg chewable aspirin orally (324 mg total). Note: May be administered prior to establishment of IV access.

E. If blood pressure > 90 systolic and patient has **not** taken *Viagra* or *Levitra* within last 24 hours (or *Cialis* within the last 48 hours):

1. Administer nitroglycerine 0.4 mg (1/150 gr) SL. Note: May be administered prior to establishment of IV access.
2. Repeat every 3-5 minutes until pain is relieved.

3. If blood pressure falls below 90 systolic or decreases more than 30 mm Hg below patient's normal baseline blood pressure, then discontinue dosing and **contact MCP** to discuss further treatment.

**Figure 7.2:** Procedures like this one are used for training. They also standardize care.



## Instructions on a Website

**Figure 7.4:** Instructions are increasingly found on websites. Here are some survival tips on the Worst-Case Scenarios website.

**Title of instructions** →

**Steps** →

**Graphic offers a visual to enhance reader's understanding.** →

The screenshot shows a web browser window titled "Worst-Case Scenarios" with the URL "http://www.worstcasescenarios.com/mainpage.ht". The page has an orange header with the title "WORST-CASE SCENARIOS: online" and a navigation menu with links: 01 SCENARIO ARCHIVE, 02 STORE, 03 FUN AND GAMES, 04 LICENSING, 05 SURVIVAL COLUMN, 06 ABOUT, 07 CONTACT US. There is also a link "E-MAIL THIS SITE TO A FRIEND" and a "HOME" button. The main content area is titled "SCENARIO ARCHIVE" and lists several survival tips with underlined titles: "How to Jump from a Building into a Dumpster", "How to Survive If Your Parachute Fails to Open", "How to Make Fire Without Matches", "How to Avoid Being Struck by Lightning", "How to Land a Plane", "How to Escape from a Sinking Car", "How to Fend Off a Shark", and "How to Wrestle Free from an Alligator". The "Extreme Survival" section is highlighted, showing the title "How to Use a Defibrillator to Restore a Heartbeat" and a paragraph of text. To the right of the text is a diagram of a human torso with two defibrillator pads placed on the chest. Below the diagram is a caption: "Click image to enlarge and view captions".

**Worst-Case Scenarios**

<http://www.worstcasescenarios.com/mainpage.ht> Google

**WORST-CASE SCENARIOS: online**

- 01 SCENARIO ARCHIVE
- 02 STORE
- 03 FUN AND GAMES
- 04 LICENSING
- 05 SURVIVAL COLUMN
- 06 ABOUT
- 07 CONTACT US

E-MAIL THIS SITE TO A FRIEND

HOME

**SCENARIO ARCHIVE**

[How to Jump from a Building into a Dumpster](#)

[How to Survive If Your Parachute Fails to Open](#)

[How to Make Fire Without Matches](#)

[How to Avoid Being Struck by Lightning](#)

[How to Land a Plane](#)

[How to Escape from a Sinking Car](#)

[How to Fend Off a Shark](#)

[How to Wrestle Free from an Alligator](#)

**Extreme Survival**

**How to Use a Defibrillator to Restore a Heartbeat**

Defibrillation is the delivery of a powerful electrical shock to the heart. (The defibrillator is the device used in movies and TV shows: two handheld pads are placed on the victim's chest while an actor yells "Clear!") In the past, defibrillators were very heavy, expensive, needed regular maintenance, and were mostly found only in hospitals. Now there are more portable units available. A defibrillator should be used only for a Sudden Cardiac Arrest (SCA), an electrical problem that cannot be helped by CPR.

**How to Use a Defibrillator**

1. Turn on the defibrillator by pressing the green button. Most machines will provide both visual and voice prompts.
2. First, remove the person's shirt and jewelry, then apply pads to the chest as shown in the diagram displayed on the machine's LCD panel. One pad should be placed on the upper right side of the chest, one on the lower left.
3. Plug the pads into the connector. The defibrillator will analyze the patient and determine if he needs a shock. Do not touch the patient at this time.

Click image to enlarge and view captions

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## Instructions with Sequentially Ordered Steps

Steps are clearly numbered.

Graphics are used to clarify written text.

Notes are used to explain steps.

### Step 3— Compose the Picture

After adjusting camera settings, you are ready to frame your picture.

#### 1 Ready the camera.



• To prevent blurred pictures caused by unsteady hands (camera shake), hold the camera steadily in both hands. Pictures can be framed in the monitor (A) or viewfinder (B).

#### 2 Frame your subject.



Zoom out Zoom in



Indicator in monitor displays amount of zoom while either **W** or **T** is pressed.

- Frame your subject using the zoom button. Press the **W** to zoom out from your subject, increasing the area visible in the frame. Press the **T** to zoom in on your subject so that it fills a larger area of the frame.
- When the camera is zoomed all the way in to the **T** (Telephoto) side of the zoom indicator, holding the **T** down activates digital zoom, which can be used to magnify your subject even further (p. 90).

#### Don't Block the Shot

To avoid dark or partially obscured pictures, keep your fingers and other objects away from the lens and flash window.

#### Move That Camera!

Although zoom is a useful tool for composing pictures, remember that original compositions can be created just by moving the camera to another position. If you have time, try framing your subject from a number of different angles—including from below and above—to find the one that produces the best shot.

#### Monitor or Viewfinder?

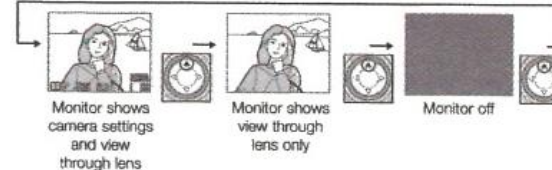
Use the monitor to confirm camera settings at a glance while at the same time viewing an image that shows how the final picture will appear. This is particularly important when the image in the viewfinder does not accurately reflect what will appear in the final picture, for example when:

- macro close-up is used (p. 93)
- your subject is within 1.5 m (4.9 ft.) of the camera
- you are using digital zoom (p. 90)
- you are using an optional lens converter for wide-angle or telephoto photography (p. 145)

Using the viewfinder allows you to save power by turning the monitor off (see below). The viewfinder can also be used when bright ambient lighting conditions make the display in the monitor difficult to see.

#### Controlling the Monitor

The **▲** on the Multi selector controls the monitor display in **AUTO**, **SCENE**, **CSM** and **▶** mode. Press **▲** to cycle through monitor settings as shown at below.



**Figure 7.8:**

Each step should express one action. Putting the steps in list format makes them easier to follow.

Graphics support the text.



## Placement of Hazard Statements

Warning statements are prominently displayed.


Symbols draw attention to warnings.

Boxes are used to capture the readers' attention.

Figure demonstrates proper use of the machine, including use of appropriate safety devices like glasses, earmuffs, and gloves.


### OPERATING INSTRUCTIONS

#### OPERATING TIPS



**WARNING:** Dress properly to reduce the risk of injury when operating this unit. Do not wear loose clothing or jewelry. Wear eye and ear/hearing protection. Wear heavy, long pants, boots and gloves. Do not wear short pants, sandals or go barefoot.

1. Move the cultivator to the work area prior to starting the engine. The cultivator may be transported by pushing it on wheels or carrying it by the shaft tube grip.



**WARNING:** To prevent serious personal injury, never pick-up or carry the unit while the engine is running.

2. Start the unit per Starting Instructions.
3. With the engine running and the tines off the ground, depress the throttle control to increase the engine speed.
4. Holding both of the handlebar grips firmly, slowly lower the cultivator until the tines make contact with the ground (Fig. 13).
5. As cultivating action begins, pull back on the cultivator so that the tines can penetrate the ground.
6. Once the ground has been broken, continue at a moderate pace until you are familiar with the controls and the handling of the cultivator.
7. Pull the cultivator backwards to improve the depth of cultivation and reduce your effort.
8. If the tines are digging too deep or not deep enough, adjust the tines per Adjusting Tine Depth.




Fig. 13

#### ADJUSTING TINE DEPTH

Tine adjustment will vary depending on the type of soil being cultivated and how it will be used. Generally, adjusting the tines to break the soil 4 to 6 inches is recommended for most gardens. Adjust the tines as follows:

1. Stop the engine and disconnect the plug wire.
2. Loosen (do not remove) the two wing nuts on the tine guard (Fig. 14).
3. Slide the wheel bracket assembly down for shallower and up for deeper tine penetration.
4. Once the tines are in the desired position, tighten the wing nuts, making sure that the carriage bolts are seated properly through the bracket.
5. If the tine depth is not correct, repeat steps 2 to 4.

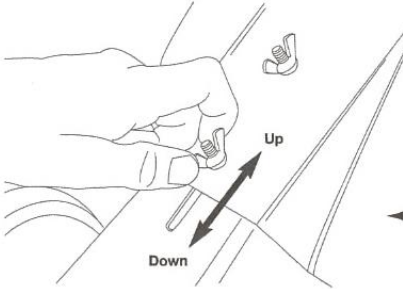



Fig. 14

#### Transporting the Unit



**WARNING:** To prevent serious personal injury, always stop the engine when operation is delayed or when transporting the unit from one location to another.

1. Stop the engine.
2. Slide the wheel bracket assembly all the way down.
3. Tilt the unit back until the tines clear the ground.
4. Push or pull the unit to the next location to be cultivated.

**Figure 7.10:** Hazard statements need to be prominent in the page design. In this user's manual, the warnings stand out because boxes and symbols draw attention to them.

A close-up graphic shows how to accomplish important tasks.

# Assignment

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- Write a user manual for your project.
  - $\approx$  5-7 pages
  - Graphics (screenshots?) for most of the steps
  - Use the outline

## 1. Introduction

- *What will these instructions help me do?*
  - *Do I really have to read this?*
  - *Is there anything special I need to know?*
- 

## 2. Description of Equipment

- *If I'm working with equipment, where are the parts I need to use?*
- *If I'm working with software, where do I find the tools I need to use?*

## 3. List of materials/tools needed

*What equipment, tools, materials, or other things do I need?*

## 4. Directions

*Once I'm ready to start, what – exactly – do I do?*

## 5. Troubleshooting

*Something isn't working correctly. How do I fix it?*

## 6. Conclusion

*What should I have when I'm done?*

