

Writing Instructions

Guiding a reader through a

process

Role of instructions & manuals

- Documents written most by technical communicators
- Other communicators write instructions for formal docs (manuals) and information docs (emails, memos)
- Critical to making products, procedures, and systems safe and “user friendly”

Analyzing Audience ■

Background (social, education)

- Skill level
 - Use appropriate vocabulary
 - Translate necessary terms

- Needs and use

People read instructions in one of three ways:

1. Some, but only a few, read instructions all the way through before beginning to follow any of the steps
2. Others read and perform each step without looking ahead to the next

3. And still others begin a task without reading any instructions and turn to them only when difficulties arise
 - Since you have no way to control the third group, assume you are writing for readers who will read and perform each step without looking ahead. Therefore, all instructions must be in a strict chronological order

Don't forget...

- An incorrect audience analysis is the biggest reason why instructions and manuals fail

- Language should always be clear, concise, and brief
- Do not use long or complex sentences

A brief example...

(Shhh... no talking during this example)

Follow These Instructions

1. Take out a sheet of paper
2. Fold the paper in half (top to bottom)
3. On the right-hand side of the page, write the words
“instructions test”

4. Fold the paper in half again (side to side— this will make your paper look like a greeting card)
5. Draw a smiley face on the front of the card
6. Write your name on the card
7. Fold the paper in half from top to bottom again
8. Ignore step five
9. Pass the paper to the instructor

Any problems?

Elements of Instructions (short version)

- General introduction
- Step-by-step instructions

- Conclusion

Elements of Instructions (long version)

- Everything from here on out.

Title

- Use a specific title that accurately names the action covered in the instructions

- *Poor:* Snow Removal

Title

- Use a specific title that accurately names the action covered in the instructions

- *Poor:* Snow Removal

- *Better:* Using Your Acme Snow Blower

Purpose

- Explain the purposes of the instructions unless it is obvious (i.e., the purpose of a coffee maker)

Purpose & Audience

- Explain the purposes of the instructions unless it is obvious (i.e. the purpose of a coffee maker)
 - These instructions are for nurses who must inject dye into a vein through a balloon-tipped catheter
 - This safe practices book is for employees who operate cranes and riggers

Writing Instructions (intro)

- Have reader-centered title (what does the writer have to do?)

- Have a clearly stated purpose that includes reader benefits
- List parts, materials, and conditions

Parts, Materials & Conditions

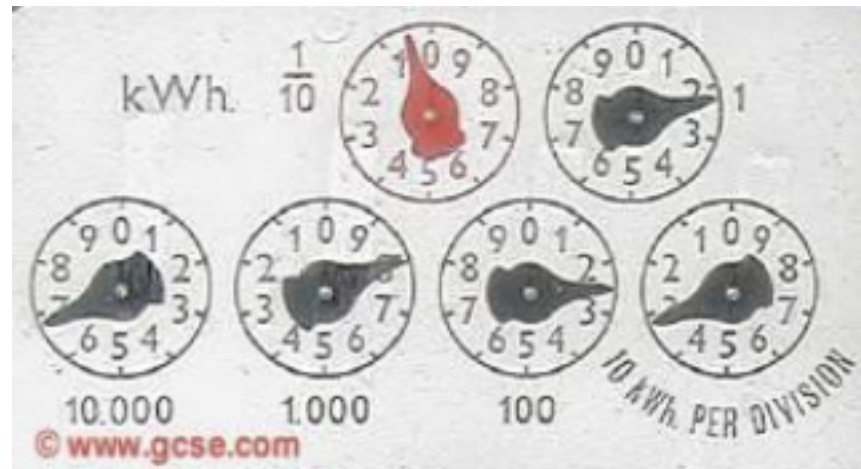
- If readers needs to gather items in order to follow the instructions, list those items in the introduction –
Materials are the items needed to perform the task (sandpaper, shellac)
 - *Tools* are the implements needed (screwdriver, pliers, small paintbrush)
 - *Conditions* are special circumstances that are important for completing the task successfully, such

as using a dry, well-ventilated room

Writing Instructions (steps)

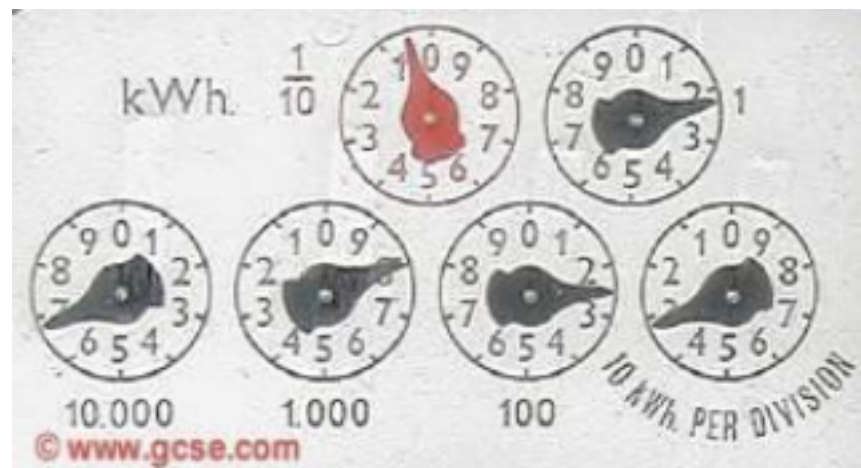
- Number (or otherwise organize) steps ■ Use present tense and imperative mode (and don't omit articles – a, an, the, to create briefness)
- Provide the right amount of info for each step
- Separate steps from background info or tips

Be specific



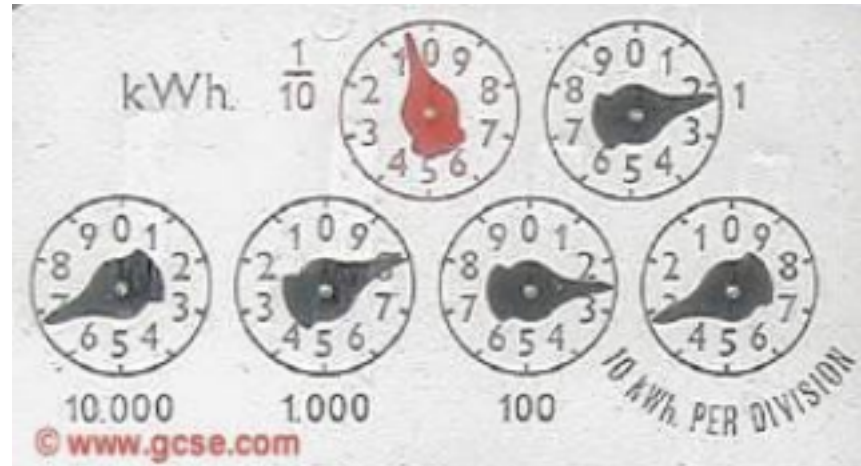
- Read a dial

Be specific



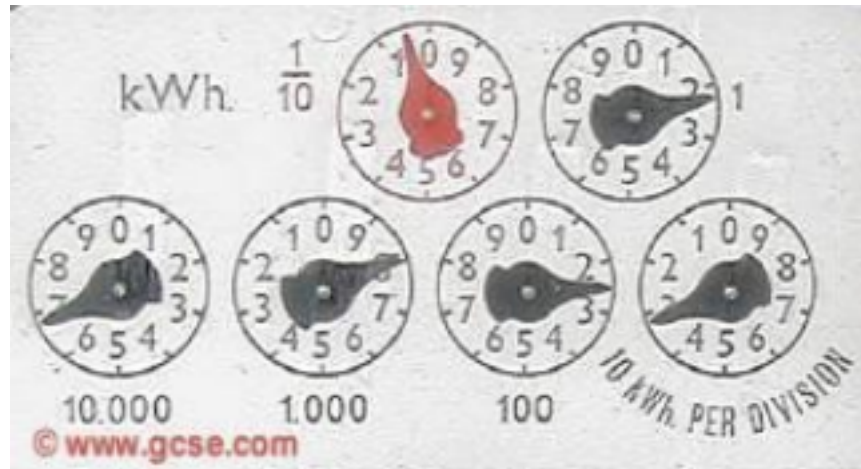
- Read the dial

Be specific



- Read the top dial

Be specific



- Read the top left dial (in red)

Ambiguous wording, even in implied commands, leads to confusion

What's wrong with this?

1. Take out two slices of bread
2. Spread the peanut butter on the bread
3. I

like mine with marshmallows and Fritos 4.

The knife needs to be washed 5. Put the lid back on the peanut butter

Is this better? Why?



1. Take out two slices of bread
2. Take out a clean knife
3. Spread the peanut butter on the bread
4. Wash the knife and place the lid back on the peanut butter

Note: I like to add marshmallows, and Fritos to my peanut butter sandwiches

Writing Instructions (conclusion)

- Tell readers what to expect after following the instructions and suggest other uses and options if appropriate
 - Your food will be hot, but not as brown as if heated in the oven rather than the microwave. A few minutes of standing time will complete the cooking cycle and distribute the heat uniformly

Organization & Design

- Separate your instructions into logical pieces (chronological order)
- Use relevant instructions/graphics
- Make the sections of your instructions visually distinct
- Separate and label info that isn't directly part of your instructions

From Delta Dust Collector Instructions

ASSEMBLY

ASSEMBLING WHEEL CASTERS

1. Remove the hex nut and lockwasher from each of the four wheel casters.
2. Place the dust collector on its side.
2. Insert bolt from wheel caster through the four holes (A) Fig. 3 in the base of the dust collector.
3. Place a lockwasher (A) Fig. 4 onto each bolt.
4. Thread hex nut (B) Fig. 4 onto each of the four bolt heads and tighten securely.

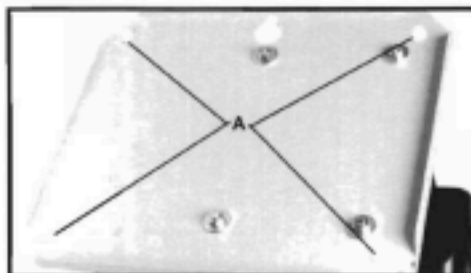


Fig. 3

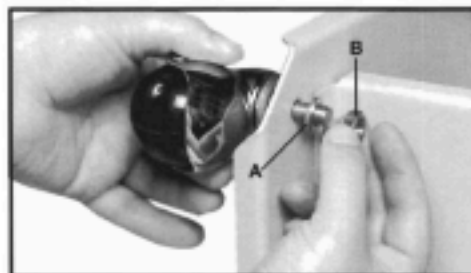


Fig. 4

ASSEMBLING OUTTAKE FLANGE

1. Align the holes in the outtake flange (A) Fig. 5 with the holes in the outtake flange gasket (B).
2. Insert a 5/16-18x5/8" hex head bolt thru the outtake flange, outtake flange gasket and the base unit as shown in Fig. 6.
3. Thread a 5/16" hex nut (B) onto the 5/16-18x5/8" hex head bolt (A) Fig. 6 and tighten securely.
4. Repeat this process for the three remaining bolts.

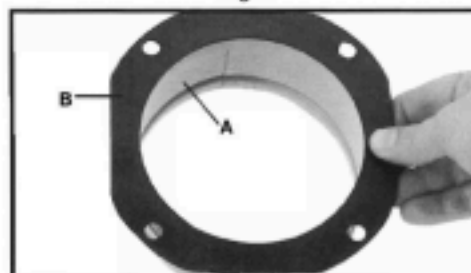


Fig. 5

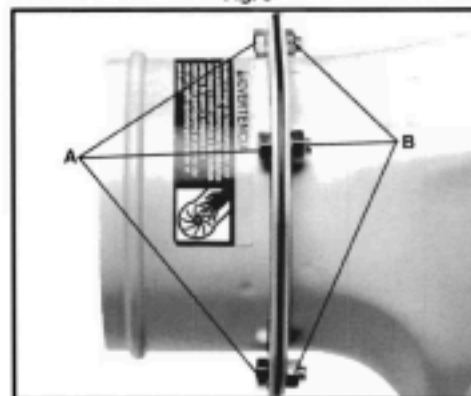


Fig. 6

Writing Safety Information

- Place in prominent area on the page
(Location, location, location)
- The more critical the safety comment, the
LARGER and **MORE EMPHATIC** it should
be

Levels of Safety defined

- Danger – likelihood of serious injury or death ■

Warning – potential for minor/moderate injury ■

Caution – potential for equipment damage ■ Note –

suggestions for how to best carry out the task

A note about safety info

- There is no universal language or definitions for safety terms
- Because of liability issues, companies will not (and should not) ask you to write safety instructions unless you're a

professional technical communicator

Remember

- Know your audience
- Keep your instructions simple
- Start with an introduction
- Use a clear and effective visual hierarchy ■

DON'T SKIP STEPS JUST BECAUSE THEY SEEM OBVIOUS

- Conclude with a summary or description ■

And, one more time, just so we're clear on this...

State the Obvious

CAUTION

THIS SIGN HAS
SHARP EDGES

DO NOT TOUCH THE EDGES OF THIS SIGN



ALSO, THE BRIDGE IS OUT AHEAD

