



INSTRUCTIONS, USER
MANUALS AND SOPs



ACTIVITY: LEAD-IN

We could not unfortunately cover the activity in today's class. Before next class, watch the video link below and prepare for a discussion on what specific problems did you notice in following the criteria for writing instructions by the kids in the video

https://youtu.be/cDA3_5982h8



COMPONENTS OF INSTRUCTIONS

Essential components
Additional components

KEY COMPONENTS OF INSTRUCTIONS

Title Page

Safety
Requirements

Access

Definitions

Colors

Text

Icons

Table of
Contents

Introduction

Glossary

Required Tools
of Equipment

Instructional
Steps

Organize steps
chronologically

Number steps

Use highlighting
techniques

Limit Information
within each step

Use short words,
sentences and
paragraphs

Begin your steps
with verbs

Do not omit
articles

TITLE PAGE

Title and Purpose

Graphic depicting your product or service

Product or component and specific details it is about

SAFETY REQUIREMENTS

Before instructions for performing the step

Can be written along with each step to avoid accidents

Additional safety measures for a step

Helps protect customer/consumers

Helps protect company

SAFETY REQUIREMENTS

Can be written along with each step to avoid accidents

Additional safety measures for a step

Helps protect customer/consumers

Helps protect company

Significant for maintain ethical standards

SAFETY REQUIREMENTS

Can be written along with each step to avoid accidents

Additional safety measures for a step

Helps protect customer/consumers

Helps protect company

Protects against legalities as it can help avoid **lawsuits** and **liability** issues

ACCESS

Typeface and type size

Use white space to separate it

Make it obvious

Box the warning

Graphics do it

DEFINITIONS

Differentiation of hazardous notation

Important information
necessary for tasks, data
and convenience

Potential equipment
damage

Note

Caution

Potential harm/injuries

Warning

Danger

Potential for
fatalities/death(s)

COLORS



Colored window or text box

Note is printed in blue
Caution in yellow
Warning in orange
Danger in red

TEXT

For drafting your hazard notation use text

A 1–2-word identification

Consequences of hazards in 3–5 words

Avoidance steps

Exact nature to alert readers

Effect

Steps to take to avoid it

ICONS

Multilingual world today

Add icons (any image that is of consequence)

EXAMPLE

FIGURE 3 Hazard Alert



1	Hazard alert word
2	Hazard alert color
3	Alert symbol
4	Identification—what is the specific hazard?
5	Consequence—what are the potential results?
6	Avoidance steps—what should you do?
7	Hazard icon

TABLE OF CONTENTS

Several sections

- Technical specifications
- Warranties
- Guarantees
- FAQs
- troubleshooting tips
- Customer services
- Contact numbers

INTRODUCTION

Instructions are reader friendly and aim at audience involvement

Try to reach them in a personalized way

Effective introduction builds rapport and customer relationships

EXAMPLE

Thank you for your purchase. Installation and operating procedures are contained in this manual about your new 3-D TV. The minutes you spend reading these instructions will contribute to hours of viewing pleasure.

Use you and your pronouns to personalize manual

Positive words

GLOSSARY

If audience is not familiar with terminology, they might miss information and perform an operation incorrectly

Define an audience in case an audience does not know

Any method can work

Early in the instruction

Throughout the manual

In a glossary at the end

EXAMPLE

GLOSSARY

BDC	Bottom dead center
CCW	Counterclockwise
Danger	This hazard alert designates the possibility of death. Be extremely careful when performing an operation.
RMS	Root mean square

REQUIRED TOOLS OR EQUIPMENT

Provide detail in the beginning

Tools or equipment required for a task

List

Graphics

EXAMPLE

Tools Required
1—2 mm hex wrench



1—pliers





INSTRUCTIONAL STEPS

Concrete actions

Number your steps
Use numerical numbering
Avoid alphabets or bullets

ORGANIZE STEPS CHRONOLOGICALLY

Follow steps in the sequence in which they are to be performed

Make sure its chronologically accurate to accomplish task correctly

Avoid lawsuits by drawing attention to information through formatting

HIGHLIGHTING TECHNIQUES

Boldface

Type face and
Type size

Text boxes

Emphatic warning
words

Color

Italics

LIMIT INFORMATION WITH EACH STEP

Don't overload your reader by lengthy steps

EXAMPLE

BEFORE

Overloaded Steps

Start the engine and run it to idling speed while opening the radiator cap and inserting the measuring gauge until the red ball within the glass tube floats either to the acceptable green range or to the dangerous red line.

AFTER

Separated Steps

1. Start the engine.
2. Run the engine to idling speed.
3. Open the radiator cap.
4. Insert the measuring gauge.
5. Determine whether the red ball within the glass tube floats to the acceptable green range or up to the dangerous red line.

DEVELOP YOUR POINTS THOROUGHLY

Avoid vague content by clarifying directions, needed equipment and caution

BEFORE

After rotating the discs correctly, grease each with an approved lubricant.

AFTER

1. Rotate the disks clockwise so that the tabs on the outside edges align.
2. Lubricate the discs with 2 oz of XYZ grease.

USE SHORT WORDS, SENTENCES AND PARAGRAPHS

Do not write chunky sentences

Readers are already new to tools,
equipment and technical concepts
involved

BEGIN STEPS WITH VERBS

Write strong specific verbs at the start of each step

EXAMPLE

Verbs Begin Steps

1. *Organize* the steps chronologically.
2. *Number* the steps.
3. *Use* highlighting techniques.
4. *Limit* the information within each step.
5. *Develop* the points thoroughly.
6. *Use* short words and phrases.
7. *Begin* the steps with verbs

Do NOT OMIT ARTICLES

A, An, The make sentences grammatically correct

EXAMPLE

BEFORE

1. Press right arrow button to scroll through list of programs.
2. Select program to scan.
3. Place item to scan face down on scanner glass in upper left corner.

AFTER

1. Press the right arrow button to scroll through a list of programs.
2. Select the program you want to scan.
3. Place an item to scan face down on the scanner glass in the upper left corner.



ADDITIONAL COMPONENTS

TECHNICAL DESCRIPTIONS

A technical description could be a part-by-part explanation or labeling of a product or system's components

It could also include a schematic (depicting product/system's electrical layout)

Helps readers recognize parts when referred in steps

Product specifications such as size, shape, capacity, materials of construction etc.

Technical descriptions in combination with callouts simplify reader's job

EXAMPLE

Smartphone Specifications

Height:	114 mm (4.48 inches)
Width:	66 mm (2.6 inches)
Depth:	15 mm (0.59 inches)
Weight:	136 grams (4.8 ounces)
Monitor Resolution:	480 × 320 pixel color display

WARRANTIES

Protect customer and manufacturer

Protects customer as for a warranty period
usually a customer has a right to free
repairs or replacement of a product

Protects company as no product lasts
forever as well

Disclaimers are also another component
of warranties

Note: Any change or modification
(unapproved) render warranty void

Proof of purchase with a receipt showing
it is under warranty

Serial number matching on product

Company isn't liable in case of failure to
comply with instructions of installation

ACCESSORIES

User manual provides additional sales opportunity to a company through accessories list

Offers customer equipment such as extra-long cables, carrying cases, rechargeable batteries, wireless headsets etc.

Specifications provided for accessories

FREQUENTLY ASKED QUESTIONS

FAQs save company time and money to address common questions immediately

CORPORATE CONTACT INFORMATION

Company's street, city and state address

Hotline number

Website

Email address

GRAPHICS

Use graphics that are simple, big, clear and keyed to the text

Depends on reader. If low-tech, graphics help clarify instructions

Drawings

Photographs

Screencasts/screencapture

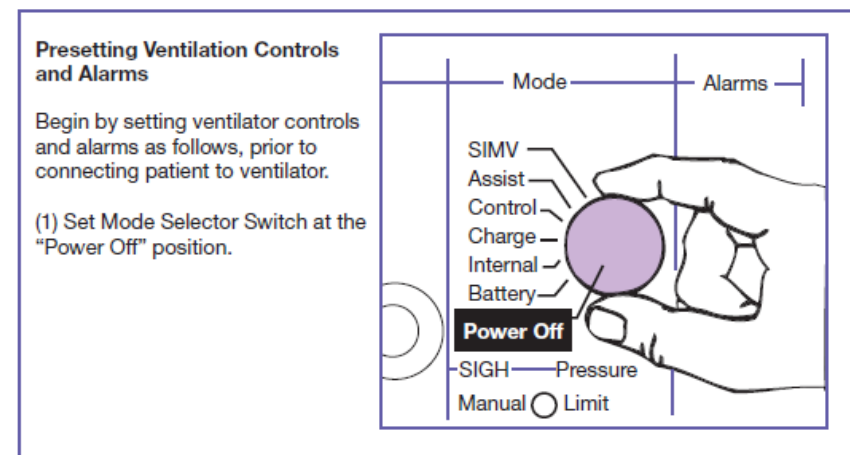
EXAMPLE

TABLE 1 Text without Graphics for High-Tech Readers

Location Item	Action	Remarks
Note: For additional operating instructions, refer to Companion 2800 operator's manual.		
1. MODE switch	Set to POWER OFF.	
2. Rear panel	Ensure that instructions on all labels are observed.	
3. Patient tubing circuit	Assemble and connect to the unit.	See Table 2, step 3.
4. Power cord	Connect to a 120/220 V AC grounded outlet.	If the power source is an external battery, connect the external battery cable to the unit per Table 2, step 4.
5. Cascade I humidifier	Connect to the unit.	See Table 2, step 2.

Source: Courtesy of Puritan Bennett Corp.

FIGURE 4 Instructions with Large, Bold Graphics for Low-Tech Audience



INSTRUCTIONAL VIDEOS

Screen casting can be useful for clarifying steps through an instructional video

Animated screen
visuals

Voiceovers

Captioned text

INSTRUCTIONAL VIDEOS

More effective for end user

Excellent for visual learners

Can be downloaded anywhere

Alternative to hard copy text

Allow end-user interaction

Demonstrative

Consequences of hazard alerts

STANDARD OPERATING PROCEDURES

SOP is a set of instructions that document routine or repetitive technical or administrative activities in business/industry

Reference for ensuring accuracy of procedures

Both hard copy and electronic

STANDARD OPERATING PROCEDURES

SOP is a set of instructions that document routine or repetitive technical or administrative activities in business/industry

Reference for ensuring accuracy of procedures

SOPs ARE USED IN

Science

Healthcare

Biomedical
technology

Military

Computer
industry