

USER INSTRUCTIONS

Writing user instructions is simple, if you know some of the “guidelines” for writing good instructions. Here are a few guidelines:

1. Start with the imperative verb (the imperative verb helps to command individuals to do something).

Example: (poor instructions)

To turn on the computer, press the POWER button.

Example: (good instructions -> start with the verb)

Press the POWER button to turn on the computer.

2. Use a photo, illustration, Screenshot, or other image to orient the user.

Note: Arrow-points may be added to create clarity on larger images. Make sure there is enough contrast between the arrow and the image to make the arrow more noticeable/viewable.

3. Use a numerical sequence instead of using conjuncts such as first, second, third, lastly, finally, etc.

4. Use ALL CAPITALIZED LETTER to indicate a specific button.

Example:

Press the RETURN key to run the program.

Hold down the CONTROL key while pressing the SHIFT key.

5. Use quotation marks to indicate other specific components/elements.

Open a new document by pressing the FILE key under the “File Tab,” and clicking NEW.

6. Use the “+” (or addition sign) to indicate that a shortcut or keystroke is “paired” with another key or is engaged simultaneously. Typographically, leave a space on either side of the addition sign.

Example:

Hold Down FUNCTION + F7 to enable the “monitor control” function.

7. Use “Notes” to help the reader with sensory or informational cues. Notes help to alert the reader to any mechanisms that may occur during the process of following the instructions.

Example:

Press COMMAND + SHIFT + 3.

Note: You will hear a “clicking” noise, which indicates that a screenshot has been taken.

Example:

Press POWER and hold down SHIFT + F1.

Note: You may smell smoke (or a slight metallic smell) as the hard drive begins to overheat (without the support fan operating properly).

8. Most instructions are written as imperative sentences (or commands); therefore, make sure to end all commands with periods.
9. Keep your instructions or directions short and concise. Use only short sentences.
10. Use approved warnings to indicate any immediate danger or precautions (see the chapter on VISUALS) for more information.

Example:

Press the POWER button on the computer.

CAUTION: If the heat sinks are not properly installed, the computer may start a fire.

11. Test your instructions before providing them to others.

OPTIONAL INSTRUCTIONAL TECHNIQUES

1. Bold items that seem especially important (see the bolded components in the guidelines above... notice how only the most important words of the guidelines are bolded).
2. Some photos, graphics, or other images may be assigned Figure numbers.
3. Use STEP 1, STEP 2, STEP 3, etc.
4. Include troubleshooting advice or alternative instructions, if possible.

Example:

To take a screenshot:

Press COMMAND + SHIFT + 3.

Note: If the computer does not function properly, you may use the "Grab" application from the Applications menu.

5. Use only image-based instructions for an international audience.

USER DOCUMENTATION

User Documentation usually comes in the form of instruction sets or learning modules (procedures/directions) which help the user to perform a series of tasks

MODULAR DESIGN

User Documentation is usually designed to provide the reader with just enough information to complete one task at a time.

Each Module Should Contains

- +Short Explanations pertaining to specific tasks/rules/etc.
- +Necessary steps for accomplishing the specific task/adhering to the rules/regulations
- +Hazard Messages/Safety Information/Repercussion Discussion/etc.
- +Deductive Outcomes (teach the individual where the step will take them – what the result will be)
- +List the tools/equipment necessary for the task and clearly explain them
- +Separate the instructions from explanations

USER DOCUMENTATION COMPOSING PROCESS

1. Audience Analysis

- conduct a study, formal or informal, to determine the user's needs.
- consider (additionally) everyday tasks which may present difficulty or a specifically adapted process which should be addressed
- look at previous documentation (if applicable)

2. Organizing

- Organize in task-oriented, sequential steps (consider this example of task-oriented, sequential steps: Getting an account, logging in, receiving email, sending email, replying, etc.)
- Organize similar types of information similarly

3. Designing

- Clearly labeled figures
- Consistent Formats
- Decision Tables (If... Then...)
- Modular Design (create short steps which explain specific tasks)

4. Usability Tests

Usability tests are test performed to ensure that the manual works and is useable.

SUGGESTIONS

Be clear

Be specific

Be coherent (logical)

Be concise

Use international English

Use a consistent method of naming elements (e.g. equipment/personnel/etc.).

Try not to cross-reference (make readers "jump around to different pages")

Accommodate random flipping through pages (most studies indicate that this is the favorite mode of reading)

Illustrate liberally (use graphics, tables, pics, etc.)

Use color/different typography for emphasis

Use symbols for notation (+, <>, smiley faces, etc.) only when needed.

Consider reading patterns (Americans typically read from left to right and up to down)

Select an appropriate size and document format (use the entire page when needed)

