

Writing instructions

General sections that should be included:

- ❶ Introduction / Background
- ❷ Description & List of Materials and Equipment needed – Extra Tools Required
- ❸ Steps – Graphics, Texts, Safety Information
- ❹ Conclusion
- ❺ Troubleshooting

However, your instructions should also include a cover and title page and table of contents (these **do not** count towards the 10 pages for the assignment). In addition, appendixes, list of references, glossaries, list of symbols, indexes can be included (likewise, these **do not** count towards the 10 pages for the assignment).

Note: consider the usability of these various elements to determine what makes sense in the context of the tutorial.

❶ Introduction

- Introduces the subject, purpose, context of use and reader of tutorial
 - Subject – what the tutorial is about
 - Purpose - i.e. a specific outcome after all is done
 - Intended reader – i.e. level of expertise (novice, intermediate, expert)
 - Context of use
 1. Scope – what the tutorial will cover/ what it will not cover
 2. Forecast Organization – how the tutorial is organized in certain major steps & the order of these steps (so as to help sequential, key point and reference readers)
 3. Usage – how the tutorial can be used most effectively – i.e. modular design for reader's level of expertise
 4. Conventions – explains symbols, and other conventions used in tutorial
 5. Motivations - reassures the reader that they're doing the right thing
 6. Safety – gives any safety advice before the activities start

❷ Description & List of Material and Equipment Needed

Your reader will want to know and get an overview of the specific equipment:

- Location of various parts of equipment (for example, where buttons are located on a phone, the names of the buttons etc)
- Function of equipment (for example, what functions the buttons have)

Your reader will also want to know if extra materials are needed before they start

- Tools given with the product
- Tools already expected to be in the user's possession (i.e. screwdrivers etc.) but not given with product

③ Steps

Using General Strategies for Steps

- Use Balance, Alignment, Grouping, Contrast, Consistency rules; active white space
- Create a page template & be consistent

Creating Modular Design

- Write each direction for quick comprehension and practical use by user
- Help readers locate the next step quickly
- Use a modular design: distinguish major conceptual steps from minor steps, and divide these in sub steps. For example, notice how in this guide I distinguish my major categories by using the following styles:

EXAMPLE:

Major Step

Sub Step 1

Sub Step 2

Writing Down Steps

- **1. Give one action per step**
- **2. Present steps in a usable list format (numbered)**
- **3. Use the command voice and imperative mood** – start each step with action verb so it is clear what action should be performed. (Note how each of these steps start with an invisible “You”)
- **4. Use reader-centered action-oriented headings:** i.e. making your reader's actions the focus

Example:

Correct Header: **Installing your TV** (makes the reader the focus)

Incorrect Header: **How to Install Your TV** (makes the manual the focus)

- **5. Signal to your reader the completion of each step, and forecast the next step.**

Example:

You have now successfully turned on your phone. Proceed to the next step to learn about basic phone functions.

Creating Visual Strategies to Distinguish Actions from Effects

- **Highlight key words (i.e. actions) to distinguish various steps**
- **Bold actions from non-action material.** This will make it clear that the bolded part should be followed, whereas the sentence you are reading now could only feature an observed effect of that action: this distinguishes **actions performed** from responses/ observed effects of these actions.

Creating Branching Steps

- When your steps branch in two directions, make sure to indicate this to your reader. Branching steps occur when there are two or more options for the user in following the instructions.

Example:

To proceed installing the cable, go to Step 2: Installing Your Cable.

To skip installing the cable, and proceed with setting the channels go to Step 3: Setting up Your Channels on page 5

Using Graphics

- Use many graphics
- Use graphics that are clear: Eliminate any unnecessary clutter.
- Use graphics that feature the user's perspective (i.e. if they have to press a button, show it from the perspective of the user, because this helps them to orient themselves).
- Always Refer in your text to the graphic, and add description and figure number below any graphic (see figure 1)

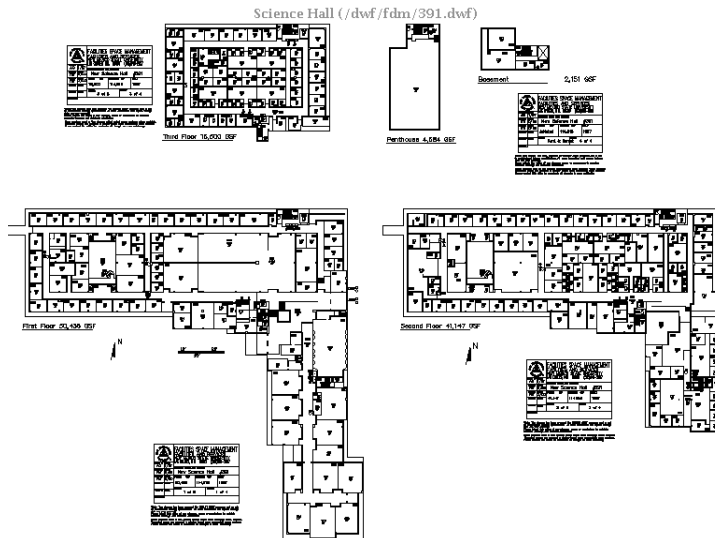


Figure 1. Overview of Science Hall

- Consider using the table function to differentiate between text and graphics (Go to **Table>Insert>Table** in Word). Note that tables work fine on a single space, but do not expand well across a page.

Example:

MAJOR STEP	
Minor Step Text 1	Graphic 1
Minor Step Text 2	Graphic 2

Creating Safety Warnings

CAUTION: Create Safety Warnings that signal **in advance** if there is a risk for the user: do this before the step.

Make sure to set this warning off from the text by way of a graphic + text

- Note the three form hierarchy:
- Danger – Risk of serious injury or death
- Warning – Injury likely
- Caution – Damage to equipment or product

4 Conclusion

- **Signal end of instructions (congratulate your reader for finishing them)**
- **Indicate what finished product should look like**
- **Direct user to troubleshooting section or customer assistance**

● Troubleshooting

Use Troubleshooting if something goes wrong –

- Troubleshooting can be at the bottom of the individual step, or
- Appear at the ending in a separate section
- Consider using the Q/A table structure mentioned in book on page 569

NOTE: also see chapters 19 and 8 in TCT for more info.