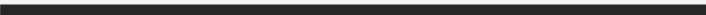




CREATING INSTRUCTIONS

What are instructions?

- Clear, step by step guides to completing a process
- Similar to, but not, a process description
- Limited to process that can be completed by the reader
- Constructed in imperative mood



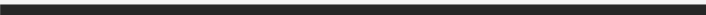
Planning the document

- Plan
 - Identify your audience
 - Choose your language level
 - Specialist?
 - Novice?
 - Select examples
 - Appropriate
 - Adequate
 - Concise
 - Include background information if necessary
 - Choose a mode
 - Booklet
 - Poster
 - Label
 - Brochure
 - Consider setting
 - Consider size



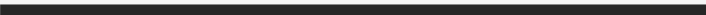
Drafting the body

- Draft
 - Title
 - Clear
 - Precise
 - How-to
 - Gerund
 - Introduction
 - Who and how many people?
 - Why?
 - When?
 - Safety
 - Materials (items used up in the course of completing the instructions) and tools (reusable items)
 - Begins with introductory text
 - Uses a bulleted list format
 - Denote if the item is included or not included if necessary
 - Time requirement



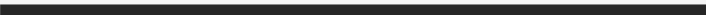
Drafting the Body (continued)

- Draft
 - Steps
 - In order of completion
 - Use **numbers** for easy tracking
 - Group into stages or related steps for longer processes
 - Steps in each stage or group should start at 1
 - Only **one verb** per step
 - Use imperative mood (implied “you”)
 - Use examples if necessary



Options

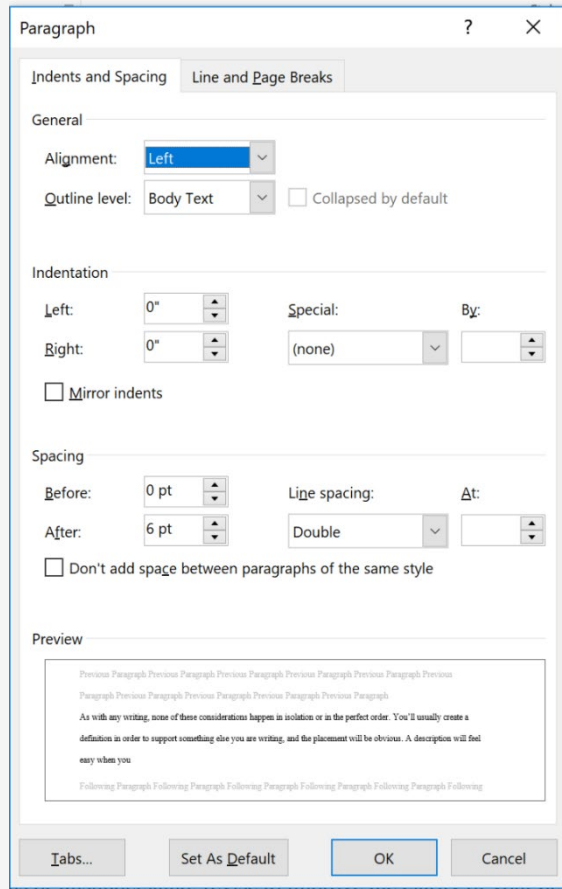
- Denote options for completion
 - For example
 - Opening the Twain Window
 - You have two ways to open the scanner: from the application program or from Windows.
 - From the application program
 - *Step 1*
 - *Step 2*
 - *Step 3*
 - From Windows
 - *Step 1*
 - *Step 2*
 - *Step 3*



End with a conclusion

- A paragraph, not step
- Provides a sense of closure, reassurance, congratulations
- Conclusions may
 - Describe the results
 - Explain the maintenance of a product
 - Detail serving and pairing suggestions for a recipe
 - Include troubleshooting information
- Example
 - Congratulations! Your new scanner is now ready for use. If any questions come up, please check the troubleshooting guide or call our 24-hour hotline at 1-800-555-1234.

Formatting



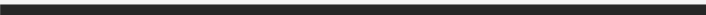
- Single spaced within steps; Double spaced between steps
 - In Word, either
 - Highlight all of your instructions
 - Insert these settings before you begin
 - Go to the “home” tab
 - Click the popout button for “paragraph” settings
 - For spacing, set both the before and after at “6”
 - For line spacing, set the option at “single”
 - Select “ok”
- Use headers to separate sections, major steps, and sub-steps
 - Left aligned headers are more visible
 - Use clear verbs in headers
- Fonts
 - Select an easy-to-read font
 - Avoid overly stylized fonts like Comic Sans and Courier
 - Size should be reasonable (12 point for content, 24-36 for headers)

Use good style

- No passive voice
 - No first person
 - Concise language
 - Correct grammar and spelling
 - Parallelism
 - Consistency
 - Strong verbs
-

Proofreading

- Test your instructions by completing the process yourself
- Test your instructions by using proofreaders
- Look for points of confusion
 - Where do they ask you questions?
 - Where do they complete a step incorrectly?
- Revise!



Other considerations for instructions

- Front matter
 - Preface
 - Table of contents
 - Troubleshooting contacts
 - Website
- Back matter
 - Specifications
 - Government and industry standards met (ROHS, ASCII, etc.)
 - Index
 - Glossary

