

Assignment 5: Instruction Set

Instruction sets are common technical documents for many disciplines and occupations. Employees read instructions to learn how to assemble a product or complete a procedure. Supervisors write out company policies that oftentimes serve as instruction sets. Customers read instructions for using a product. For this assignment, you will develop a set of instructions advising users how to perform a specific task.

Before deciding on a task, consider the following guidelines:

- Choose something you are very familiar with. It can be something related to your field of study (e.g. how to use a particular piece of laboratory equipment), or something related to a more general audience (e.g. how to learn to juggle).
- Ideally, your audience should be someone who has never performed this task before.
- Your audience should have a general understanding of the topic area.
- Choose a task with an appropriate level of difficulty—neither too easy nor too hard to explain in the space allotted.
- The task may involve a device: assembling it, operating it, or fixing it. Or it may involve some process (e.g., registering using eLion).
- The process should have discrete parts or steps that are fairly easy to name and refer to.
- Your task should be explained in *at least* 3 pages (single-spaced) of written instructions, including visuals.

The planning worksheet will ask you to elaborate on your topic. Note that I need to approve all topics (in order to ensure that you have selected a topic of appropriate size and scope).

Topics:

Your instructions should help users to perform any kind of task that requires several steps or stages. Here are some topic ideas (don't be limited by them):

- how to change the oil in your car
- how to iron a shirt
- how to add another component (CD-ROM, hard drive, sound card, etc.) to your computer
- how to groom a dog
- how to reformat your hard drive (yikes!)
- how to use your ATM card (include many options, not just how to withdraw and deposit)
- how to cook a turkey
- how to French braid your hair (or someone else's)

Rhetorical Situation

Before you begin to write, consider the rhetorical situation for your instructions. Use the planning worksheet to help you determine the purpose, audience, context, and content for your instructions.

Contents:

Depending on the nature of your task, you may wish to include some or all of the following contents.

- ◆ Introduction or background information. Here you'll provide your reader with the following information, if applicable:
 - an overview of the steps needed to complete the task
 - definitions of terms or concepts they need to know before they proceed
 - cautions or warnings that apply to the task as a whole
 - a sense of how long the task will take
 - where they should perform the task (i.e. in a well ventilated area, outside, on a flat surface, etc.)
- ◆ List of materials or ingredients needed.
- ◆ Diagrams, drawings, photographs, figures, or tables. (Neat sketch of the diagram is fine).
 - Include captions for each illustration or figure.
 - Label charts and diagrams clearly.
 - Make sure to give a sense of scale and orientation.
- ◆ List of steps, in chronological order.
 - Make sure you use the imperative mood. (That is, say this: "Attach the red wire" rather than this: "The red wire is attached." With the second phrase, readers will not know whether the wire is already attached or if they need to attach it.)
 - Phrase each step clearly and concisely.
 - Provide "feedback" that informs the reader what will happen after they complete each step.
 - Include warnings or cautions **before** readers will encounter problems.
 - Break long lists into sections with appropriate sub-headings.
 - Make sure sub-headings and steps are phrased in parallel form.
- ◆ Troubleshooting tips.
- ◆ Glossary of key terms and definitions.

Organization

Instructions are normally organized in a chronological order. Beyond that, here are some other guidelines:

- ◆ The focus of instructions should be on tasks the user performs, not capabilities of a system or product. Headings and sub-headings should reflect this focus. For instance, “Compiling your program” puts the focus on the audience’s task, while “Program compilation” puts the focus on the system.
- ◆ If there is no necessary chronological order for your instructions, then choose another rationale for the organization. For example, you could move from more to least important tasks, from general to specialized tasks, from most to least common tasks, and so on.

Format

Your instructions should be designed to accommodate multiple reading styles and user needs. Accordingly, your design should include:

- ◆ A clear hierarchy of headings and subheadings.
- ◆ Well-chosen fonts. For print documents, sans-serif fonts are usually best for headings; serif fonts are best for body text. (For online documents, the reverse is true.)
- ◆ Numbered lists and bulleted lists, where appropriate. Know the difference. Make sure bullets and numbering are consistently formatted. Do not number or bullet lists with fewer than two items.
- ◆ An appropriate amount of white space—neither too much nor too little.
- ◆ Effective use of alignment. Centered alignment may make it harder for users to skim headings and sub-headings; left alignment or indentations can be more effective for this.
- ◆ Effective use of contrast. Too much contrast means that nothing stands out; too little makes it hard for users to find what they need. Consider emphasizing elements like headings, key words, and warnings.
- ◆ Consistently used design features. Decide which fonts, font sizes, and forms of emphasis you will use and apply them consistently.

Length should be at least 3 pages single-spaced.

Evaluation

Audience Accommodation: The instructions are appropriate for the intended audience. They're written from a user-centered, rather than system-centered, perspective and in the imperative mood. They anticipate the user's questions, difficulties, and needs.

Content: The instructions include all of the information needed to complete the task at hand. Background information, warnings, and definitions are included where appropriate.

Organization: The instructions are organized logically. Items within numbered lists are organized chronologically. Sub-sections are clearly marked with headings.

Format: The instructions include each of the format features listed above. The overall design is clear and consistent. The instructions use fonts, white space, contrast, alignment, headings and sub-headings appropriately and consistently.

Style: The instructions effectively create a professional ethos. The tone is effective for the audience. Instructions are written as active voice commands. Headings and numbered and bulleted items are in parallel form (that is, they use similar grammatical structures for each item in a list and for the text of headings). The document is free from typographical or grammatical errors.