Technical Instructions

Technical Instructions: Instructions, Procedures, and Manuals © 2023 by Joyce Bower is licensed under [CC BY 4.0](http://creativecommons.org/licenses/by/4.0/?ref=chooser-v1)

[Video](https://linnbenton.hosted.panopto.com/Panopto/Pages/Viewer.aspx?id=df235049-cf79-4346-bf62-b01b0154f816&start=0)

[Slide Deck](https://docs.google.com/presentation/d/1l-RwKaBzP956sK6-euvvgzIXikNJRduD7y_wPpLAC-0/edit?usp=sharing)

# Goals

In this presentation, we will be exploring technical instructions (which includes manuals and procedures). After watching this video, you will know:

* what they are,
* how they are used, and
* how to write effective instructions.

# What Are Technical Instructions?

Technical instructions are documents that guide a user step-by-step through a task. The key here is “step-by-step.” In a logical way, usually chronologically (first, second, third, and so on), the steps lead the user to the desired outcome.

# What Are Some Examples?

Instructions can be for anything from simple tasks, such as making a peanut butter and jelly sandwich, to complex procedures, such as using advanced computer software. No matter the task, it is important to have the steps be logical and clear.

# Bad Instructions

Take a moment now to go through these instructions.

## Problems?

What problems did you encounter? Steps being out of order? Steps being unclear?

When you write instructions, this is a good example of how you need to have your instructions tested by users. User testing is a key component of developing and revising instructions to avoid failed results.

# How Can I Write Effective Technical Instructions?

As with all technical documents, instructions focus on the end user. This focus on the audience is crucial in developing clear, concise, yet thorough instructions. Not having a clear idea of who the users are is what most often makes instructions fail.

## Who are the users?

Learn about who your users are by looking at their background (What is their education? culture?), skills (What terms might you need to explain? What level of vocabulary/jargon do they understand?), and needs (Why do they need to use this? What other needs might they have?)

## Three Groups of Users

There are typically three groups of users:

* Those who will read every word before beginning the task. These are the diligent users who read the instruction manuals from cover to cover before beginning the process.
* Those who will read each step as they go along. These are the ones who begin the task and read and then do (not reading ahead in most cases).
* Those who will read the instructions only when they encounter difficulties. These are the ones who set the instructions aside and begin the task and will not read the instructions until they are so frustrated with the problems they encounter that they then need to find where they are going wrong.

So which of these should be the target audience? Do not assume that every user will read the instructions cover-to-cover before starting, and you cannot control the third group. Therefore, the second group, those reading step-by-step, should be your target audience.

## How Should the Instructions Be Organized?

Whether your instructions are for a simple or complex task, the structure is fairly similar:

* First, introduce the task and user.
* Second, take the user step-by-step through the task.
* Third, conclude by explaining what should be the result of following the steps.

### General Introduction and User

* Purpose: Who are the intended users? What are they being instructed to do?
  + Example: These instructions are for new baristas who operate the espresso machine.
* Supplies: What tools and/or supplies does the user need before beginning the task?
  + Example: The ingredients needed for making a recipe.
* Conditions: What does the user need to know before beginning?
  + Example: Be in a well-ventilated area.

### Step-by-Step Instructions

* Use chronological order. Chronological order places every step in order of when it should take place. (Think: first, second, third, and so on.)
* Use numbers or some other form to organize the steps.
* Use imperative mood (orders, commands).
  + Example: Spread the peanut butter….
* Use present tense.
  + Example: *Take the lid off.* (Not *Took the lid off.*)
* Use parallel structure for each step. That is, use the same grammatical structure for each step.
  + Take the lid off the peanut butter jar.
  + Put the butter knife into the jar to get about a tablespoon of peanut butter.
  + Spread the peanut butter on one side of the bread.
* Provide enough information for each step.
* Use substeps whenever needed.

### Conclusion

Tell users what they can expect after following the steps. If applicable, tell users other uses or options.

Example: After following these steps, you will have a strong cup of coffee with rich flavors and a deep color. You can also use the French Press to….

## Safety Information

* Use the appropriate level of safety.
  + Danger: Death or serious injury may occur.
  + Warning: Moderate injury could result.
  + Caution: Minor injury or equipment damage may happen.
  + Notice: Suggestion may help carry out the task better.
* Label it, making sure that it will stand out.
* Place the information near the step where it is needed.
* Note: In professional settings, these will be written by professional technical writers to avoid legal issues.

## State the Obvious

When it comes to instructions and safety, state the obvious.

# How Do I Format Technical Instructions?

## Images

* Include an image or several images, preferably with labeled parts.
* Cite the image. Give credit where credit is due, using whatever citation style needed. (APA, MLA, or whatever you are required to use.)
* Depending on the steps, you may need to include an image for each step. Other times, you may only need one at the beginning and one at the end.

## Formatting

* Use headings (especially for the steps). These are typically in bold font, so that way users can find what they need quickly.
* Use block paragraphing and single spacing, unless told otherwise.
* Be consistent for each part. For each part, use the same pattern. Examples:
  + **Step 1:** Take out two slices of bread.
    - Note: I used homemade buttermilk bread.
  + **Step 2:** Twist the lid off the jar of peanut butter.
* Be simple and concise in your wording. You do want to be thorough, but you also want to use as few words as possible to convey each step. Remember, the user is reading to get the information (not to be entertained).
  + Bad example: Take out two slices of the most delicious bread you can find. Of course, it is up to you which kind, but my favorite is homemade bread, preferably buttermilk. It is so soft and pairs nicely with the peanut butter and strawberry jam.
  + Reason: We do not need all the preferences and extra words, such as *delicious*. If you would like to add a note, you may, but keep it separate from the step itself, as in the example. “Note: I used homemade buttermilk bread.”

## Reminders

* When writing any document, keep your audience (the users) in mind. What do they need?
* Revise!
* Use document design.
  + Headings
  + Bold print
  + Color if needed or wanted
  + White space
* Edit!
  + Technical writing avoids unnecessary adjectives and adverbs.
  + Keep wording concise.
  + Keep it simple.

# Review

Remember, when it comes to the technical instructions, you will have three parts:

* Introduction
* Steps
* Conclusions

# Conclusion

I hope you now have a better understanding of technical instructions and how you can write an effective step-by-step guide through a task.