

Writing in Organizations

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Lecture 7

MGM 202

Writing Instructions and
Procedures



جامعة الجميع الذكية
EVERYONE'S SMART UNIVERSITY

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Writing Instructions and Procedures

1- Instructions, Procedures, and Your Job:

As part of your job, you may be asked to write **instructions**, alone or with a group, for your co-workers as well as for the customers who use your company's services or products. Your employer stands to gain or lose much from the quality and the accuracy of the instructions you prepare.

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You may also be called on to write a set of **procedures** as a part of your job. The purpose of writing procedures is very different from preparing instructions. As we saw, a set of instructions explains how to install, repair, or safely use something. Procedures, however, refer to policies, duties, or protocols that a business or organization expects its employees to follow.

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2- Why Instructions Are Important:

Perhaps no other type of occupational writing demands more from the writer than do instructions because so much is at stake—for both you and your reader. The reader has to understand what you write and perform the task as well. You cannot afford to be unclear, inaccurate, or incomplete. **Instructions are significant for many reasons, including safety, efficiency, and convenience.**

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- Safety

Carefully written instructions get a job done without damage or injury. **Poorly written** instructions can be directly responsible for an injury to the person trying to follow them and may result in costly damage claims or even lawsuits.

To make sure your instructions are safe, they must be:

- accurate
- consistent
- thorough
- clearly written
- carefully organized
- legally proper

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- Efficiency

Well-written instructions help a business run smoothly and efficiently.

- Convenience

Clear, easy-to-follow instructions make a customer's job easier and less frustrating. In the customer's view, instructions reflect a product's quality and convenience.

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3- Using Word Processing Programs to Design Instructions:

To make sure your instructions are easy to read both for native as well as non-native speakers of English, take advantage of the following word processing features that will help you **draft, revise, and format**:

1. Brainstorming/clustering to get ideas/steps down.
2. Use the Outline feature.
3. Choose a font that is easy to read.
4. Use numbered and bulleted lists.
5. Include boldface sparingly.
6. Be careful about the images you take from a clip art library.

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4- Assessing and Meeting Your Audience's Needs:

Put yourself in the readers' position. In most instances, you will not be available for readers to ask you questions when they do not understand something. Consequently, they will have to rely only on your written instructions.

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- Key Questions to Ask About Your Audience

The more you know about your audience, the better your instructions can be. To determine your audience's needs, **ask yourself the following questions:**

- How and why will my readers use my instructions?
- What language skills do they possess—is English their first (native) language?
- How much do my readers already know about the product or service?
- How much background information will I have to supply?

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- What steps will most likely cause readers trouble?
- How often will they refer to my instructions—every day or just as a refresher?
- Where will my audience most likely be following my instructions—in the workplace, outdoors, in a workshop equipped with tools, or alone in their homes?
- What resources, such as special equipment or power sources, will my readers need to perform my instructions successfully?

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- Writing Instructions for International Audiences:

Your instructions will often be aimed at a worldwide audience of potential customers, many of whom do not use English as their first language and may be following your instructions through a translation of them into their native language. **Here are some useful guidelines when writing instructions for this diverse group of readers:**

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1. Write in plain, simple language. Use international English.
2. Use terms and units of measurement that your readers will understand.
3. Make sure all of your visuals are clear and culturally appropriate.
4. Be aware that colors can have different meanings.
5. Ask a non-native speaker to review your instructions.

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5- The Process of Writing Instructions:

To make sure your instructions are accurate and easy for your audience to perform, **follow these steps.**

A - Plan Your Steps

Make sure you know

- the reason for doing something
- the parts or tools required
- the steps to follow to get the job done
- the results of the job
- the potential risks or dangers

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B - Perform a Trial Run

Actually perform the job (assembling, repairing, conducting, maintaining, testing) yourself or with all your writing team present. Go through a number of trial runs.

C - Write and Test Your Draft

Transform your notes into a draft (or drafts) of the instructions you want readers to follow.

D - Revise and Edit

Based on your observations and user feedback, revise your draft(s) and edit the final copy of the instructions that you will give to readers. Always consider whether your instructions would be easier to accomplish if you included visuals.

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6- Using the Right Style:

To write instructions that readers can understand and turn into effective action, **observe the following guidelines:**

1. Choose verbs in the present tense and imperative mood. Imperatives are commands that have deleted the pronoun you.
2. Write clear, short sentences in the active voice.
3. Use precise terms for measurements, distances, and times.
4. Include connective words as signposts.
5. Number each step when you present your instructions in a list.

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7- Using Visuals Effectively in Instructions:

Readers welcome visuals in almost any set of instructions. Visuals will help your readers your get a job done more quickly and increase their confidence. **A visual can help users in:**

- locate parts, areas, and so on
- identify the size and placement of parts

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- learn how to assemble parts effectively and easily
- understand the right and wrong way to do something
- identify possible sources of danger, injury, or malfunction
- determine whether a problem is serious or minor
- recognize and follow normal and safe limits/ranges

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- Guidelines for Using Visuals in Instructions

Follow these guidelines to use visuals effectively in your instructions:

1. Set visuals off with white space so it is easy to find and read them.
2. Place each visual next to the step it illustrates, not on another page or buried at the bottom of the page.
3. Select a visual that is appropriate for your audience.
4. Assign each visual a number.

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5. Make sure the visual looks like the object the user is trying to assemble, maintain, run, or repair. Don't use a photo of a different model.
6. Always inform readers if a part is missing or reduced in your visual.
7. Where necessary, label or number parts of the visual.

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8- The Five Parts of Instructions:

a set of instructions generally contains five main parts: (1) an introduction; (2) a list of equipment and materials; (3) the actual steps to perform the process; (4) warnings, cautions, and notes; and (5) a conclusion (when necessary).

1- Introduction

The function of your introduction is to provide readers with enough necessary background information to understand why and how your instructions work. An introduction must make readers feel comfortable and well prepared before they turn to the actual steps.

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- What to Include in an Introduction

1. State why the instructions are useful for a specific audience.
2. Indicate how a particular piece of equipment or process works.
3. Point out any safety measures or precautions a reader may need to be aware of.
4. Stress any advantages or benefits the reader will gain by performing the instructions.
5. Provide hyperlinks.

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2- List of Equipment and Materials

Clearly, some instructions, as in Figure 7.1, do not need to inform readers of all equipment or materials they will need. But when you do, make your list complete and clear.

3- Steps for Your Instructions

The heart of your instructions will consist of clearly distinguished steps that readers must follow to achieve the desired results.

Instructions that supply a visual with each step. **Figure 7.1**

Proper Brushing		
Place bristles along the gumline at a 45-degree angle. Bristles should contact both the tooth surface and the gumline.		Uses easy-to-follow numbered steps
Gently brush the outer tooth surfaces of 2-3 teeth using a vibrating back and forth rolling motion. Move brush to the next group of 2-3 teeth and repeat.		Visuals help readers to follow directions
Maintain a 45-degree angle with bristles contacting the tooth surface and gumline. Gently brush, using back, forth, and rolling motion along all of the inner tooth surfaces.		Begins each step with strong, active verbs
Tilt brush vertically behind the front teeth. Make several up and down strokes using the front half of the brush.		Offers helpful hints
Place the brush against the biting surface of the teeth and use a gentle back and forth scrubbing motion. Brush the tongue from back to front to remove odor-producing bacteria.		Explains why a step is important

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- Guidelines for Writing Steps

1. Put the steps in their correct order and number them.
2. Include only the right amount of information in each step.
3. Group closely related activities into one step.
4. Give the reader hints on how best to accomplish the procedure.
5. State whether one step directly influences (or jeopardizes) the outcome of another.

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6. Where necessary, insert graphics to assist readers in carrying out the step.
7. Your instructions might be translated into an international reader's language.

4- Warnings, Cautions, and Notes

At appropriate places in the steps of your instructions, you may have to stop the reader to issue a warning, a caution, or a note.

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Guidelines on Using Warnings, Cautions, and Notes

1. Do not regard warnings and cautions as optional.
2. Put warnings and cautions immediately before the step to which they pertain.
3. Put warnings and cautions in a distinctive format.
4. Include relevant explanations to help readers know what to watch out for and what precautions to take.
5. Do not include a warning or a caution just to emphasize a point.
6. Use notes only when the procedure calls for them and when they help readers.

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5- Conclusion

Not every set of instructions requires a conclusion. **For short** instructions containing only a few simple steps, such as those in Figure 7.1, no conclusion is necessary. **For longer**, more involved jobs, a conclusion can provide a succinct wrap up of what the reader has done or end with a single sentence of congratulations, or reassure readers.

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9- Model of Full Set of Instructions:

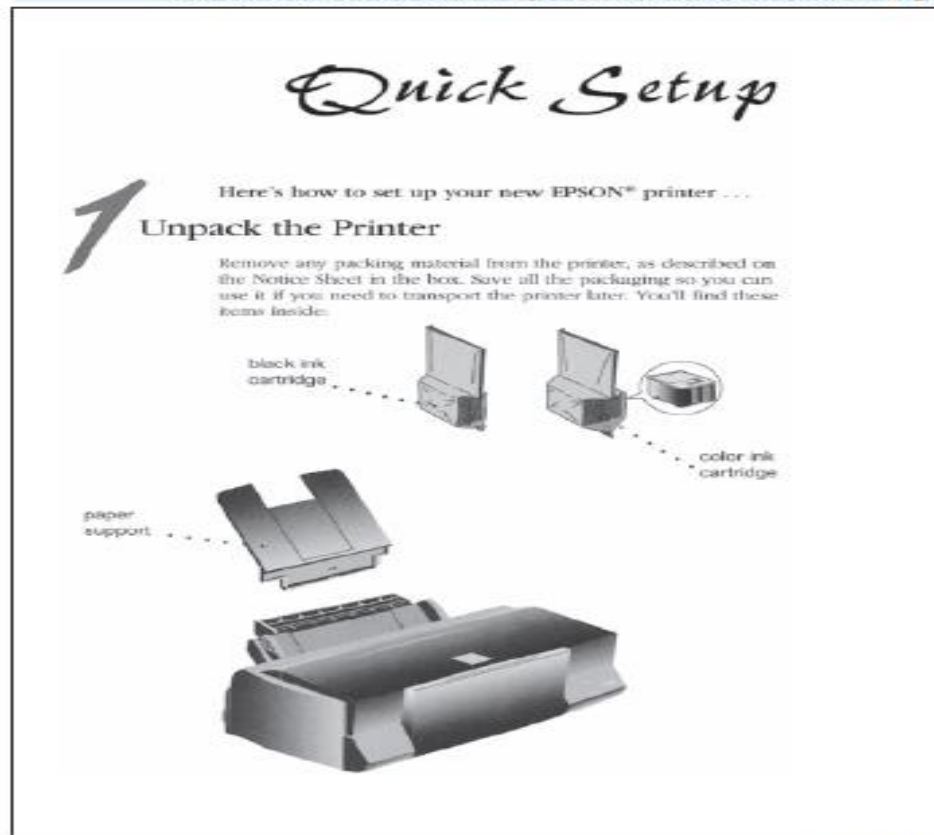
Study Figure 7.6, which is a set of instructions on setting up an Epson printer that includes the parts discussed in this chapter: an introduction; a list of materials; numbered steps; and warnings, cautions, and notes. Pay special attention to how the writer coordinates words with visuals to assist readers.

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Complete set of instructions with steps, visuals, cautions, notes, and warnings.

Figure 7.6



Appropriately brief introduction for this straightforward procedure

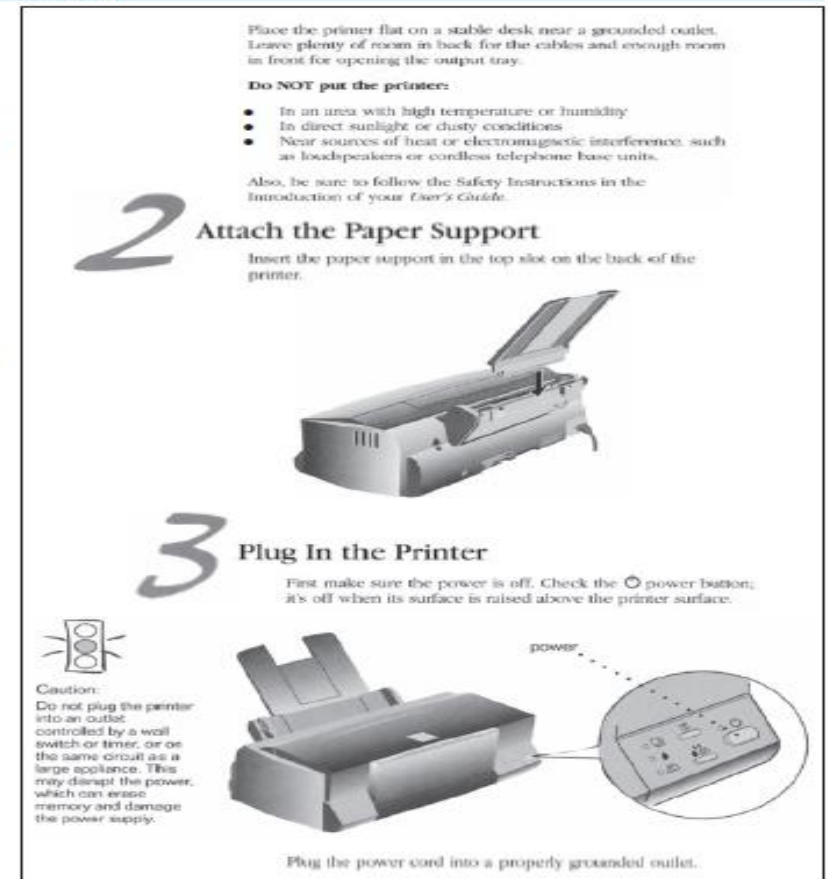
Each numbered step begins with imperative verb

List (with visuals) of materials

Exploded drawings assist readers to identify/assemble part

(continued)

Figure 7.6 (Continued)



Bulleted list highlights importance of correct printer placement

Groups clearly distinguished steps in the procedure

Uses appropriate icon to alert reader to a possible damage

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Writing Instructions and Procedures

(Continued)

Figure 7.6

4 Install the Ink Cartridges

1. Lower the output tray and raise the printer cover.



2. Press the  power button to turn on the printer. The  power light flashes, the  and  ink out lights come on, and the ink cartridge holders move to the installation position.



3. Pull up the ink cartridge clamps.



Caution:
You must remove the tape seal from the top of the cartridge or you will permanently damage it. Don't remove the tape seal from the bottom or ink will leak.



Warning:
If ink gets on your hands, wash them thoroughly with soap and water. If ink gets in your eyes, flush them immediately with water.



black ink cartridge . . .  . . . color ink cartridge . . .  . . .

(continued)

Figure 7.6

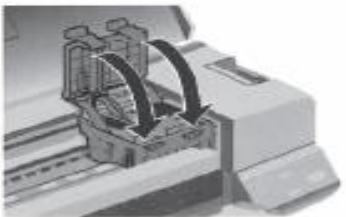
(Continued)

5. Lower the ink cartridges into their holders with the labels face up and the arrows pointing toward the back of the printer.



black ink cartridge . . .  . . . color ink cartridge . . .  . . .

6. Push down the clamps until they lock in place.



Caution:
Never turn off the printer when the  power light is flashing.

7. Press the  cleaning button to return the print heads to their home position and charge the ink delivery system. Charging can take up to five minutes, with the  power light flashing until it's finished.

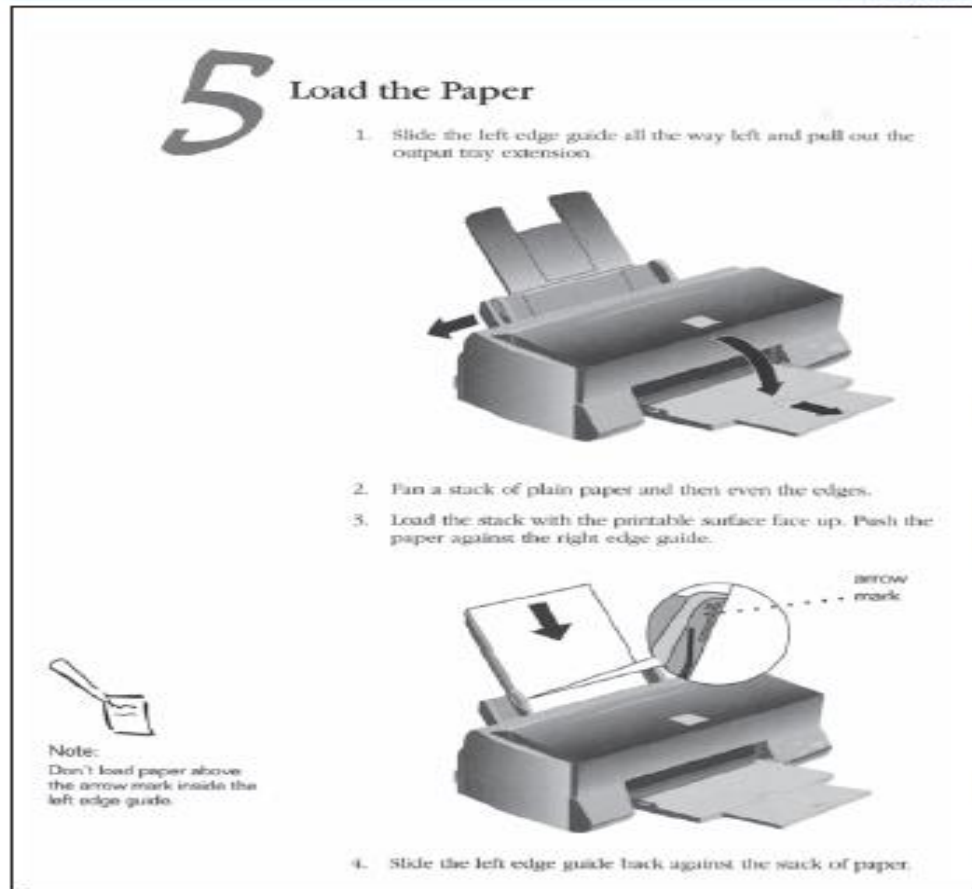
8. Close the printer cover.

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Writing Instructions and Procedures

(Continued)

Figure 7.6



(continued)

Includes two visuals, one of them an exploded drawing below; helpfully inserted between the steps to which they apply

Offers clear-cut directions on how to load paper

Helpful information in note to ensure best use of equipment

Figure 7.6

(Continued)

Provides a useful source for further information on performing step correctly

Inserts a brief introduction that alerts users to follow one of two procedures, depending on the type of computer they have

Chooses informative icon for a note

Enlarged view of parts helps readers see step

6 Check the Printer

1. Turn off the printer.
2. While holding down the  load/eject button, turn on the printer. Then release the buttons.
3. A page prints out showing the ROM version and a nozzle check pattern. When it's finished, turn off the printer. If you have any problems with the test, see Chapter 6 in your User's Guide for more information.

7 Connect the Printer to Your Computer

You can connect your EPSON Stylus™ COLOR 600 to either an IBM® compatible PC or an Apple® Macintosh. You'll need a shielded, twisted-pair parallel cable to connect to a PC or an Apple System Peripheral-8 cable to connect to a Macintosh. For a complete list of system requirements, see the Introduction of your User's Guide.



Note: The printer is assigned to parallel port LPT1; if you want to use a different port, see your Windows documentation for instructions.

Connecting to a PC

1. Turn off the printer and your computer.
2. Connect the cable to the printer's parallel interface; then squeeze the wire clips together until they lock in place. (If your cable has a ground wire, connect it now.)



3. Connect the other end of the cable to your computer's parallel port and secure it as necessary.

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(Continued)

Figure 7.6

Connecting to a Macintosh

1. Turn off the printer and your Macintosh.
2. Connect one end of the cable to the serial connector on the back of the printer.



Note:
If you're using a PowerBook™, connect your printer to the modem port.

3. Connect the other end of the cable to either the modem port  or the printer port  on your Macintosh.

8

Install the Printer Software

Now you need to install the printer software so you can control printing from your computer.

Installing on a PC

You can install the printer software for Windows 95 or Windows 3.1 from the EPSON printer software CD-ROM. If you don't have a CD-ROM drive, you can install the software using the EPSON printer software diskettes.

Installing from the CD-ROM

In addition to the printer driver and utilities, the CD-ROM contains EPSON Answers, a comprehensive online guide that includes:

- ▶ **How To** for step-by-step printer operating instructions
- ▶ **Color Guide** with practical color printing information
- ▶ **Problem Solver** to help you fix printer problems
- ▶ **Test Print** so you can check your print quality

Follow the instructions inside the CD-ROM case to install the software. To run EPSON Answers, click on its icon in the EPSON program group or folder.



EPSON ANSWERS

If you have a CD-ROM drive, you can run EPSON Answers, the on-screen guide to your new printer. It puts you on the right track quickly and easily.

Visual identifies precise location for connecting parts

Functions as both a step—installing software—and a wrap-up

Provides information for further troubleshooting and contact with manufacturer

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10- Writing Procedures for Policies and Regulations:

Up to this point, we have concentrated primarily on instructions dealing with how to put things together; how to install, repair, or use equipment; and how to alert readers to mechanical or even personal danger(s). But there is another similar type of writing that deals with guidelines for getting things done in the world of work— **procedures**. These concern policies and regulations found in employee handbooks and other internal corporate communications, such as on websites, in memos, in e-mail messages, or on a company's intranet (a private computer network).

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Some Examples of Procedures

Procedures deal with a wide range of “how-to” activities within an organization, including the following:

- accessing a company file or database
- preparing for an audit, a transition, a merger
- applying for family or medical leave
- dressing professionally at work or at a job site
- submitting and routing information
- reserving a company vehicle or facility

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- taking advantage of telecommuting options
- filing a work-related grievance
- requesting travel expense reimbursement
- seeking safety in case of a fire, flood, spill or other emergency
- fulfilling promotion requirements
- applying for a disability accommodation
- requesting a transfer within a company
- using company e-mail

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11- Some Final Advice:

Perhaps the most important piece of advice to leave you with is this: Do not take anything for granted when you have to write a set of instructions or procedures. It is wrong and on occasion dangerous to assume that your readers have performed the procedure before, that they will automatically supply missing or “obvious” information, that they will easily anticipate your next step or know what is expected of them at work without being informed. No one ever complained that a set of instructions or procedures was too clear or too easy to follow.

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References:

Successful Writing at Work, Concise
Third Edition,

By: Philip C. Kolin

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