



# The A, B, C's of Writing Good Instructions

**AACRAO Tech Conference 2008**  
**Sue Eveland**  
**University of Oregon**

# Reading and Writing Instructions

- **75% of technical writing is instructional writing**
- **85% of one-the-job reading is “reading to do” (reading instructions and manual)**
- **Is the art of writing good instructions different than other kinds of writing???**

# What Kinds of Instructions Are We Writing?

- **How to's for students:**
  - apply for admission, register for classes, change a major, file a petition, log into e-mail, use BlackBoard or WebCT...
- **How to's for faculty:**
  - process online grades, change a grade, schedule a combined exam, request a classroom...
- **How to's for staff:**
  - answer the phone, make petition decisions, change a major in Banner, order a diploma, articulate transfer credit, process an application...



# Purpose of Instructions

- **To detail the steps so that a person can complete the process in a consistent manner each time the process is done**
- **Provide documentation of a process as reference material or as training material**



# Considering Who Your Audience Is

- **A person new to the process**
- **A person using a process a second or third time**



# Considering Who Your Audience Is

- **What assumptions do you have about the reader? What do you know about the reader?**
  - they know nothing
  - they have some basic knowledge
  - they are experts



# Considering What Your Audience Needs

- **Usually the reader needs to carry out a task**
- **The reader needs you to organize and present instructions so that they can complete the task**

# Reading Styles

- **Two major theories about reading styles – both based on readers' purposes:**
  - **Huckin's five reading styles**
  - **Duff et al's two reading styles**

# Reading Styles

- **Huckin's five reading styles:**
  - **Skimming**
  - **Scanning**
  - **Searching**
  - **Receptive**
  - **Critical**

# Reading Styles

- **Duff's two reading styles**
  - **Reading to learn**
  - **Reading to do**

# Reading Styles

- **Both theories allow for the fact that a single text may have readers with different purposes.**
- **A single reader may employ different styles using the document from one time to the next or even within the same reading.**



# Huckin

vs.

# Duff

- **Skim**
- **Scan**
- **Search**

- **Receptive**
- **Critical**

- **Reading to do**

- **Reading to Learn**

# Reading To Learn

- **Reader activates long term memory**
- **Reader integrates new information for storage**
- **Often reader reads straight through a text from Page 1 to the end**
- **Reader is less likely to skip around, jump ahead to another section**
- **Reader requires few “information location” devices**

# Reading To Do

- **Reader is reading for specific actions**
- **Reader is not concerned with long term memory retention**
- **Reader rarely reads straight through a text from first page to last**

# Reading To Do

- **Reader is very likely to return to the instructions more than once and to open the text to a different place each time -- to search for specific information about one step of the task**
- **Readers expect and require “information location” cuing devices**

# Reader Expectations

- **First arrival at a document:**
  - **Expectations about what the document itself should look like**
    - Cookbook
    - Car manual
    - Software manual
    - Fashion magazine
    - Assembly instructions
  - **What happens if this expectation is not met?**

# Readers Have Three Expectations

- **Aesthetics (does it look appealing?)**
- **Legibility (can I understand it?)**
- **Ergonomics (can I use it?)**

# Every Choice You Make...

- **Word choice**
- **Writing style**
- **Type face**
- **Page size**
- **Organization**

**.....plays a role in either meeting  
or disappointing the reader's  
expectations**



# Three Reader Expectations

- **Aesthetics (does it look appealing?)**
- Legibility (can I understand it?)
- Ergonomics (can I use it?)

# More about Aesthetics

- **First glance can please a reader or cause anxiety (affective response)**
- **Reader makes a split-second decision whether or not to read the document at all**
- **Reader makes a split-second decision about how he/she feels about the document**

# More about Aesthetics

- **Is your text like an open window, where the reader feels invited in?**

**or**

- **Is your text like a closed window, where the reader feels shut out?**

# What's Aesthetically Un-Inviting?

- **Narrow margins**
- **Small type**
- **Justified lines**
- **No white space**
- **Walls of text**
  
- **Viewed as intimidating, scholarly, technical, uninviting**

# What's Aesthetically Inviting?

- **Generous white space**
- **Large type**
- **Few walls of text**
- **Logical cuing devices (chapter/section headings, numbering schemes, horizontal lines, call-outs)**
- **Viewed as visually appealing, more inviting, less intimidating, easier to skim, scan, search**



# Three Reader Expectations

- **Aesthetics** (does it look appealing?)
- **Legibility** (can I understand it?)
- **Ergonomics** (can I use it?)

# Legibility or Readability

- **Instructions should be**
  - **Easy to follow**
  - **Broken into small steps (manageable chunks)**
  - **Presented in normal or sequential order**
  - **Broken into stages if there are many steps**

# Legibility or Readability

- **Writer's job is to**
  - **Understand the process**
  - **Understand the reader's level of knowledge and experience**
  - **Break the process down into steps**
  - **Present the steps in such a way that the reader may perform the steps**

# Legibility or Readability

## ● Visual Choices

- Provide structure to the text
- Provide visual aspects that support the hierarchy of the information in the text
- Help readers locate and sort information
- Visually break down the text into conceptual units

# Structure Serves Two Functions

- **Makes a document aesthetically appealing by chunking info into a pleasing layout on the page**
- **Makes a document legible/readable (understandable) in that structure helps chunk info into meaningful units.**



# Complex Tasks

- **Require more steps**
- **Require more structure**



# Levels of Structure

- **Page layout**
- **Textual**
- **Prose**
- **Graphic**
  
- **These levels overlap and interact with each other in a document.**



# Levels of Structure

- **Page layout**
- Textual
- Prose
- Graphic



# Structure: Page Layout

- **Placement of text on the page**
- **Margins**
- **Columns**
- **Sectioning of text**
- **Placement of headings**
- **Use of call-outs**
- **Use of white space**
- **Page numbers**

# Most Important: Spacing of Text

- **1<sup>st</sup> decide on the amount of space between lines in blocks of sentences**
- **2<sup>nd</sup> decide on the amount of space between paragraphs (should be wider than #1)**
- **3<sup>rd</sup> decide on the amount of space between sections (should be wider than #2)**



# What Spacing Accomplishes

- **Keeps the invitation to read open**
- **Cues the reader visually to understand the relative importance of each piece of text**
- **Hierarchy reinforces the concepts within the process and facilitates better understanding**



# What Headings Accomplish

- **Activates readers' schema**
- **Focuses thinking**
- **Improves comprehension**

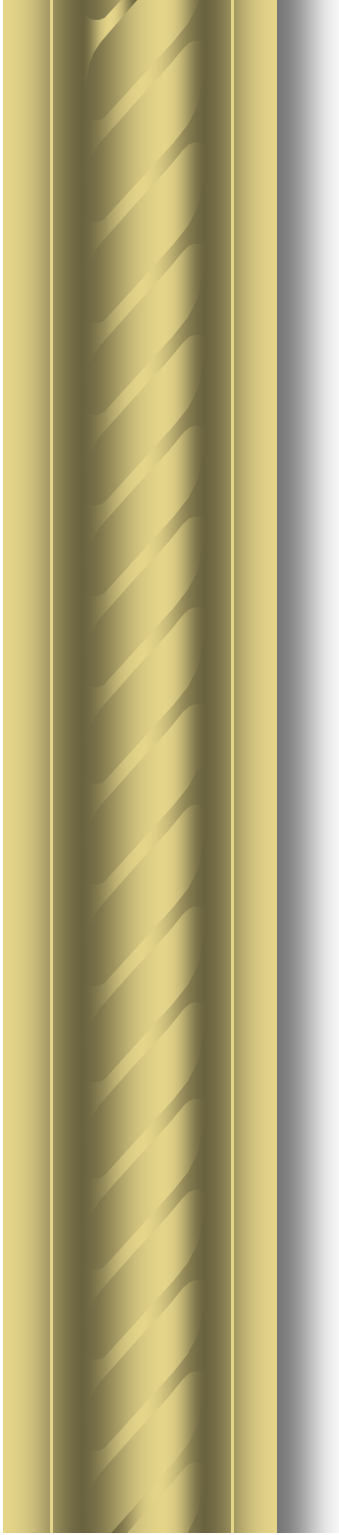
# Tips for Headings

- **Include headings in all instructions**
- **Be informative, clear, specific**
- **Use just a few words in each**
- **Focus the attention of the reader**
- **Use parallel styles**



# More Tips for Headings

- **Use two or three sizes of headings in longer documents**
- **Place headings at the left margin or even outside the left margin**
  - **Western readers read left to right**
  - **Readers view items on the left at being of higher importance**



# Tips for Text Justification

- **Use ragged right**
- **Justified text is more difficult to read than “ragged right.”**

# Tips for Text Justification

**Justified text is distracting to readers and causes readers to focus on the placement of words on each line rather than what the words are saying. Justified text can also create “rivers” of white spaces in paragraphs that can be even more of a distraction to your readers.**



# Levels of Structure

- Page layout
- **Textual**
- Prose
- **Graphic**

# Structure: Textual

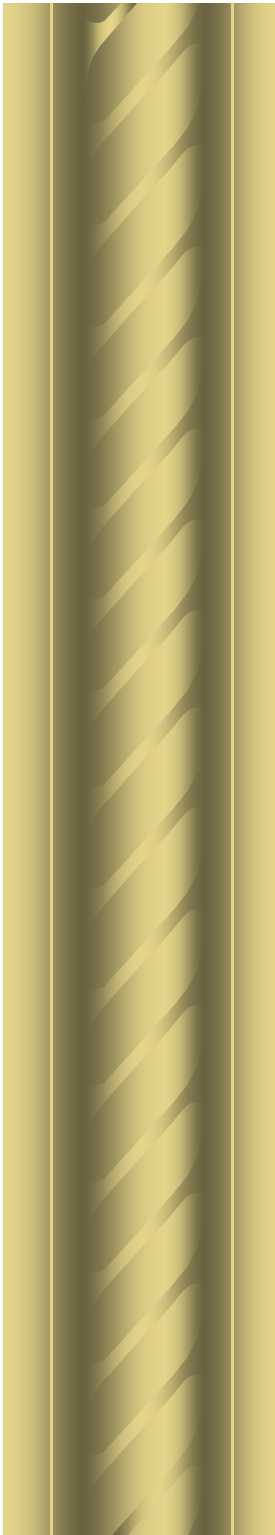
- **Kind of typeface**
- **Size of fonts**
- **Spacing between letters**
- **Spaces between the end of one sentence and the beginning of the next sentence**
- **Font “dressings” – italic, bold, underlined**
- **Colored fonts**

# Basic Typefaces

- **Serif**
- **Sans Serif (without Serif)**
- **Research says readers read serif fonts more easily and prefer text set in serif**



# An Experiment



According to research at Harvard University, it doesn't matter what order the letters in a word are, the only important thing is that the first and last letter be in the right place.

This is because the human mind does not read every letter by itself but the word as a whole.

# Tips for Type

- **AVOID ALL UPPERCASE**
  - Harder to read
  - Seems like **SHOUTING!!!**
- **Instead, give headings and subheadings prominence by using larger font sizes or bolding**
- **Draw attention to items within text by using bold, italics, or underlining**

# More Tips for Type

- **Use no smaller than 9 point for main sections**
- **Avoid colored text on colored paper and watch the web colors!**
- **Use a logical and consistent scheme**
- **Choose a variety of sizes for heads and subheads.**

# More Tips for Type

- **Major headings should be the largest type size and have the most white space (from the layout section above)**
- **Subheads should be in smaller type size with less white space**



# Levels of Structure

- Page layout
- Textual
- **Prose**
- Graphic

# Structure: Prose

- **Clarity is the most essential element in writing.**
- **The clearest simplest instructions are**
  - **Written as commands in the imperative mood**
  - **Written in simple, strong words**
  - **Written in active voice**
  - **Written in present tense**

# Imperative Mood Examples

## Not this...

- You should not smoke here
- You must fix this with glue
- You must not run
- You will need 2 cups of flour
- The operator should raise the access lid

## But this...

- Don't smoke here
- Fix this with glue
- Don't run
- Take 2 cups of flour
- Raise the access lid

# Simple, Strong Words

## Not this...

- True facts
- Square in shape
- Needless to say
- Due to the fact that
- Through the use of
- At this time
- The last step in the process is to
- In the event that

## But this...

- Facts
- Square
- (eliminate)
- Because
- By or With
- Now
- Finally
- If

# Active Voice/Start with a Verb

## Not this...

- Then the Submit button is clicked
- The two frame parts are joined with the screws.
- Plates B and C should be marked for revision

## But this...

- Click on the Submit button
- Use the screws to join the two frame parts
- Mark Plates B and C for revision

**Passive voice uses helping verbs (is, are, was)**

**Passive voice buries the subject**

# Present Tense

## **Not this...**

- **Next, you will take the form to your academic adviser so that a signature can be obtained.**

## **But this...**

- **Take the form to your academic adviser for signature.**

# Jacob's Rules for Clear Writing

- **Be direct and informal**
- **Put the most important thing first**
- **Use active voice**
- **Use first degree words (stay, not remain)**
- **Cut down on windy phrases (in the event of = if)**
- **Don't waste words telling readers what they already know**
- **Rewrite prepositional phrases (key to the main door = the main door key)**

# Jacob's Rules for Clear Writing

- Rewrite delayed subjects (there are...)
- Avoid “to be” and “to have”
- Watch agreement
- Avoid jargon, buzzwords, acronyms
- Be explicit when giving directions
- Be courteous
- Tell who, what, where, when, why

# Example:

**Log into DuckWeb as usual, then upload the file into your grade roster.**

1. Click on Faculty Menu, then click on "Course Administration Center."
2. Select a Term from the dropdown list and click on submit.
3. Find the class you want to upload grades for, and use the drop-down box in the column labels "Action" to select "Upload Grades from File", then click on the "GO" button to the right of the action.

# Example:

4. Enter the path/filename of your tab delimited text file (\*.txt), or browse for the file name and click "Open."
5. Set file type to "Tab Delimited."
6. Enter the column number that contains the student ID numbers (you noted this in step #1 above).

# Example:

7. Enter the column number that contains the grades (you noted this in step #1 above).
8. Click on "Process file" to upload the file and display an error list.  
or  
Click on "Test Upload" to upload the file and receive a complete listing of data uploaded with errors noted.

# Example:

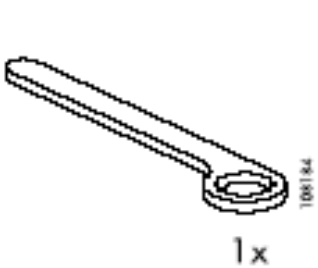
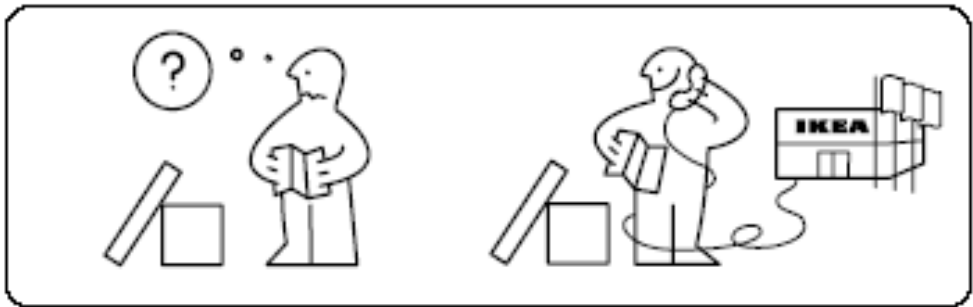
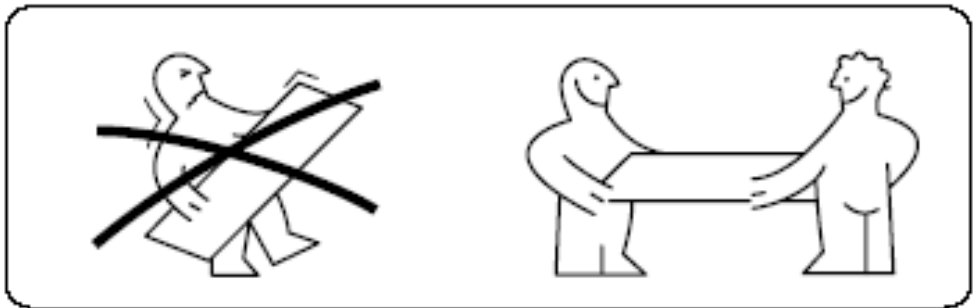
**IMPORTANT:** Print the results page for reference. Problems will be reported back to you. Note that if you enter a letter grade when a P/NP is required, the upload process will convert the grade for you and tell you on the report.

*Hint: You can't get back to this page, so print this page (or at least review it) before going on to the next step.*

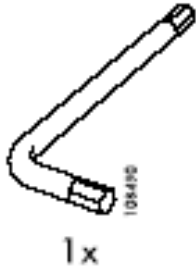


# Levels of Structure

- Page layout
- Textual
- Prose
- **Graphic**



1x



1x



4x



4x



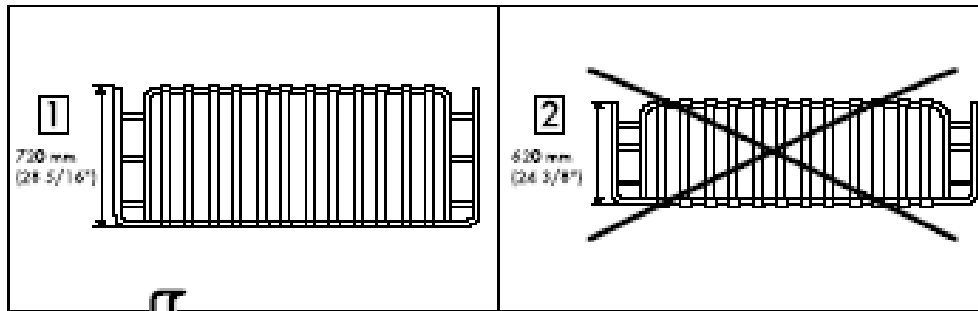
8x



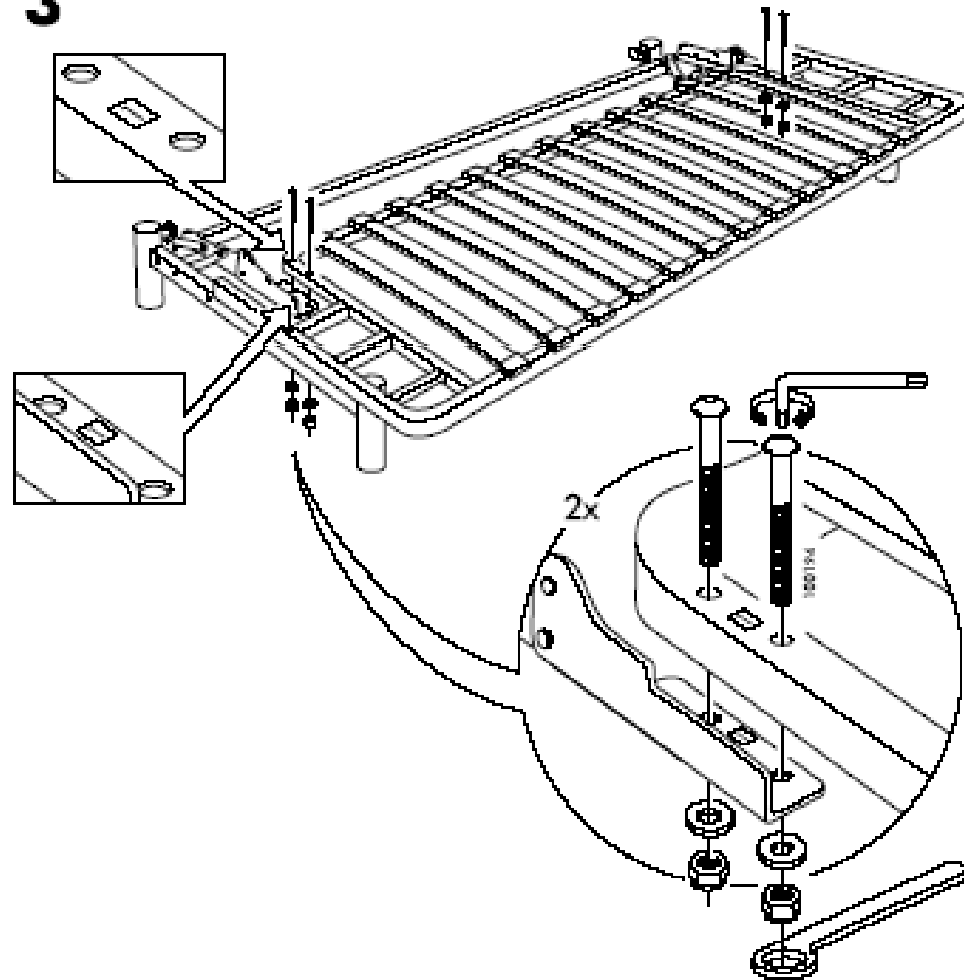
12x



12x



3



# Structure: Graphics

- **Two types:**

- **Graphics used as examples**
- **Graphics used to convey information**



# What Graphics Accomplish

- **Help readers absorb facts**
- **Make complex instructions easier to understand**
- **Help readers use information more quickly and more accurately**
- **Reinforce concepts in the text**

# The Graphics Gotcha!

- **Research shows that readers remember text better than graphics, therefore, text must carry the burden of explaining a process**
- **Graphics can only be supplemental to your written instructions**

# Tips for Graphics

- **Always explain the graphic within the text**
- **Place graphics as close as possible in the text after the first mention of the graphic**
- **Number the graphics sequentially and logically**

# Tips for Graphics

- **Give each graphic a title describing the information**
- **In the text, refer to the graphic by its number**
- **For graphic heavy instructions, a list of graphics by number and title can be helpful**



# Three Reader Expectations

- **Aesthetics (does it look appealing?)**
- **Legibility (can I understand it?)**
- **Ergonomics (can I use it?)**

# Ergonomics

- **Overall size of the document**
- **Overall orientation  
(portrait/landscape)**
- **Binding**
- **Paper choices**
- **How/where might the reader use  
your document?**

# Random Tips

- **Proofread backwards -- one sentence at a time starting from the end of your document.**
- **Proofread three times; be critical/alert**
  - Does it look right?
  - Am I following the rules?
  - It is complete?

# Random Tips

- **Acknowledge your weakness and be alert to it or avoid it (mine is affect/effect).**
- **Leave your spell checker on!**
- **Proofread TOMORROW what you wrote today.**
- **Ask a novice to use your instructions to perform the task; observe and make changes.**



# Start a Style Sheet

- **See your handout...**

# Web Resources

- <http://www.clearlanguagegroup.com/moreaboutplainlanguage.html>
- <http://www.eastendliteracy.on.ca/clearlanguageanddesign/>
- <http://www.plainlanguage.gov/>



# Book Resources

- **The Business Writer's Handbook  
(Brusaw, Alred, Oliu)**
- **Chicago Manual of Style  
(U of Chicago)**
- **Gregg Reference Manual  
(Sabin)**



# Other Resources Quoted in the Presentation

- **Available on request**



Questions?

# Contact Me!

- **Sue Eveland**

**University Registrar**

**[seveland@uoregon.edu](mailto:seveland@uoregon.edu)**

**541-346-3195**