How to Write Procedures

The Title of the Procedure Topic

The title of a procedure topic is a broad statement of an action that the user might want to accomplish. You can also think of it as a goal, the purpose of the procedure.

The Three Functions of the Conceptual Element (Introduction) in Procedures

The conceptual element, an optional component, may serve one or more of these three functions:

1. Provide a more complete explanation of the purpose of the procedure

2. Explain any pre-requisites for carrying out the procedures

5. Explain any significant implications of carrying out the procedure.

The Subtitle (Infinitive Subheading)

The infinitive subheading is an optional component. At times an infinitive subheading appears between the conceptual element and the steps as a sort of introduction to the steps. The use of two or more infinitive subheadings provides a means of presenting multiple short, closely related procedures in one procedure topic. Each subheading explains the purpose of one of these procedures.

Steps

Steps consist of action statements and—when needed—feedback statements. Action statements convey the actions that the user carries out. Feedback statements indicate how the system responds to an action.

Action Statements

Although there are hybrids and special situations, steps convey four fundamental kinds of actions:

1. **A simple action. (Do X.)**

    Click the **New** button.

2. **An action that benefits from a modifier. (Do X and here is guidance on how.)**

    On the **Page Layout** tab, click **Margins**.

    Drag the handles so that they extend beyond the borders of the rectangle.

3. **An optional action offering a variation on the main purpose of the procedure. (To accomplish Y, do X.)**

    To open the document so that it cannot be changed in any way, click **Read only**.

4. **A conditional action. It asks the user to test for a particular condition and, if the test is positive, to take an action. (If situation Y applies to you, do X.) Conditions are almost always impediments.**

    If the the **System Activity** indicator is in the overload zone, bring on one or more extra subsystems.

    If you are in the Transactions module, switch to the Report module.

5. **Local purpose statements. There are times when it is useful to explain the purpose of a particular step or group of steps.**

    Click **Bottom** to complete the box.

Feedback Statements

Feedback statements are optional. Although there are hybrids and special situations, there are two fundamental kinds of feedback information:

1. **Visible (or audible) verification that (1) the user has acted correctly and (2) the system has responded correctly. (Do X. You will see event Y happen.)**

    Click the vertex whose position you want to change.

    The vertex turns magenta, and the pointer changes to a four-headed arrow.

2. **An explanation of the system's response to an action. The explanation may provide verification but it more deeply explanatory than verification. (Do X. Situation Y results.)**

    Choose **Copy**. The selected graphic will be copied to the clipboard.

    On the **File** menu, click **Properties.**

    The settings you specify will be used each time you start the program by double-clicking its icon.

In some cases an explanation of the system's response may be part of the action statement. The system response is usually included in a "to" clause that follows the command verb of the action statement. Notice that this is not the same as an optional action. The "to" clause can also be considered a local purpose statement.

Choose **Copy** to copy the selected graphic to the **Clipboard**.

Standard and Emphatic Notes

Standard notes are used to convey relatively unimportant optional actions and conditional actions and to provide other supplemental information. Standard notes usually follow the steps.

Emphatic notes include Warnings and Cautions. They convey information about actions that might cause hard to human beings, damage to systems, or loss of data. Typically, emphatic nodes explain possible human errors and conditional actions. They must be placed before the step that the user must be warned about or possibly in the conceptual element.