

Contemporary Procedure Writing

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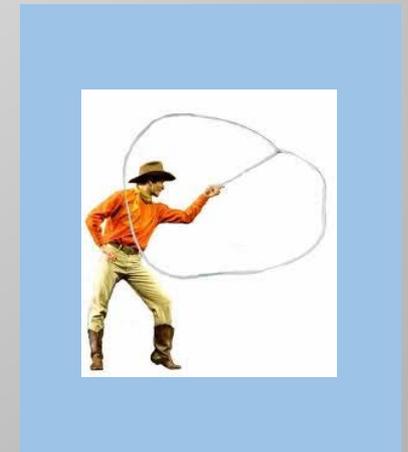
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Introduction

- Procedures are the workhorse of UA
- If you understand procedures, you can figure out the other forms of UA
- In this session you will gain a *deep level* understanding of procedures
- Occasionally, I'll rope in a related idea





Procedures consist of components— mandatory and optional

- Topic title
- Conceptual element
- Infinitive subheading
- Step(s)
 - “Do-it” step
 - User option step
 - Conditional step
 - Local purpose step
- Feedback statement(s)
- Notes

Based on:

D.K. Farkas

[The Logical and Rhetorical
Construction of Procedural
Discourse](#), *Technical*

Communication, 46(1), February
1999, pp. 42-54.

Import Your Music

Topic title

The Amazon Music Importer helps you add your personal music collection to your music library on the Amazon website, so you can play it from all of your connected Amazon Music devices.

Conceptual element

Infinitive subheading

To import your music:

1. Go to [your music library](#) from a web browser on the computer you want to import music from.
2. Click **Import your music** in the left menu. If prompted to install the Amazon Music Importer, follow the instructions.
3. Once you've downloaded or installed the Amazon Music Importer, click **Start Scan** to automatically scan your iTunes and Windows Media Player libraries for songs to import. You can also click **Browse manually** to choose files on your computer to find music. This process may take some time to complete.
4. After the Amazon Music Importer has located your music, click **Import all** to add the selection to your music library. Or, click **Select Music** to choose which songs to import.

Steps

Feedback

Note:

Notes

- You can import up to 250 songs to your music library for free. With an Amazon Music subscription, you can import up to 250,000 songs. To learn more, go to [Change Your Amazon Music Subscriptions](#). Amazon Digital Music purchases do not count towards library limits.
- Some record companies require us to insert identifiers in the metadata that accompanies music when you download it from the Digital Music Store or your music library. For more information, go to [About Record Company Required Metadata](#).

Topic titles



Topic titles (mandatory)

- Briefly explain the purpose of the procedure
- Make your topic titles “longish,” so they can help the user pick out the desired help topic

Automating your work

Using macros

Automating your work with macros



Topic title

Phrasing options:

- Verb root: Automate your work with macros
- Gerund: Automating your work with macros
- “How to”: How to automate your work with macros
- Infinitive: To automate your work with macros



“How to” phrasing creates a scanning problem on this pick list

Managing Your SlideShare Account:

- [How do I change my SlideShare email address?](#)
- [What are some troubleshooting tips for SlideShare?](#)
- [How do I control who sends me messages on SlideShare?](#)
- [How do I delete my SlideShare account?](#)
- [How do I remove a SlideShare file?](#)
- [How do I save and access my saved SlideShare presentations?](#)
- [Can I merge SlideShare accounts?](#)
- [How can I drive traffic to my SlideShare files?](#)
- [How do I block another user on SlideShare?](#)
- [How do I private message a SlideShare user?](#)
- [How do I manage email notifications from SlideShare?](#)
- [How do I connect SlideShare on other social profiles?](#)
- [Why has my SlideShare account been suspended?](#)



Infinitives create the expectation that a step will follow immediately

You lose the option to add a conceptual element, etc.

To specify Backup configuration options

1. On the **Configuration** tab, click **Backup**.



Designing UA: You need to make a plan

Part of the UA design process is to create a set of model procedures that will accommodate the variations you intend.

For example, it is possible that some of your procedures will use a table. So you need to design a model procedure that includes a table.



Conceptual element



Conceptual element (optional)

- Further explains the purpose (goal) of the procedure and essential information about the system
- Also:
 - Points out pre-requisites
 - Points out non-obvious consequences
- Use only when the topic title isn't sufficient

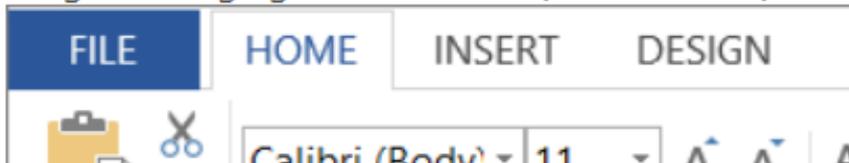
A further explanation of the purpose

A graphic would be helpful

Create a hanging indent

With a hanging indent, the second and all the following lines of a paragraph are indented more than the first. The fastest way to add a hanging indent is to use the ruler.

1. Select the text where you want to add a hanging indent.
2. Click **View** and then select the **Ruler** checkbox to [Show rulers](#).
3. Drag the hanging indent marker (shown below) to the right. It's the lower triangle on the ruler.





A further explanation of the purpose

An example would be helpful here, but this is mobile UA

Copy and paste a text style



You can copy the style of selected text and apply that style to other text.

1. Select text.
2. Tap Style, then tap Copy Style.
3. Select other text to apply the style to.
4. Tap Style, then tap Paste Style.



Indicating prerequisites

Sealing a case

When you seal case, the contents of the file can no longer be changed in any way. A case can only be sealed if the Enable Sealing option was chosen when the case was created.



Pointing out consequences

Saving as text (.txt)

When you save a file in text format, the file size decreases greatly, and you will be able to open the file in a wide range of applications. **Note:** All your formatting will be lost.

Inserting a manual page break

You can end a page and start a new page at any time. When you enter a manual page break, the existing automatic page breaks re-adjust themselves.



Overviews

Overviews are longer, higher-level conceptual elements that usually introduce a group of procedures

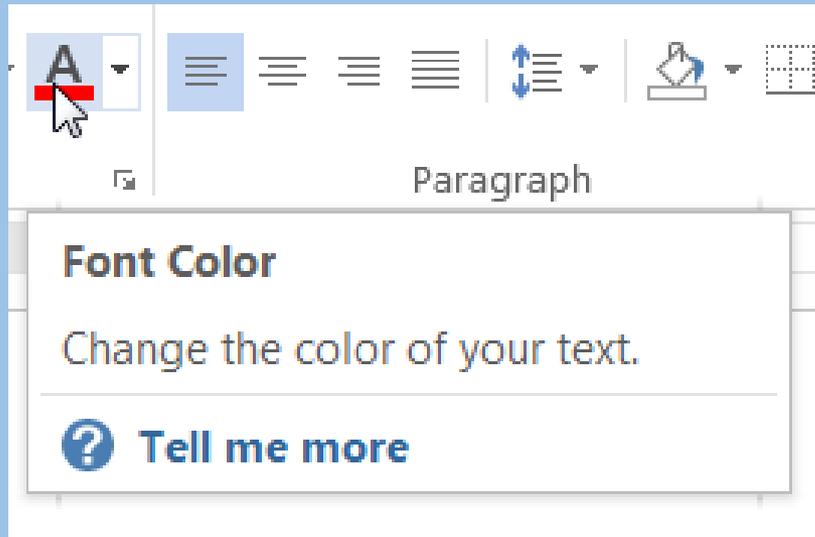
Overviews are also often used to help users make the best choice from a pick list of procedure titles



Tool tips

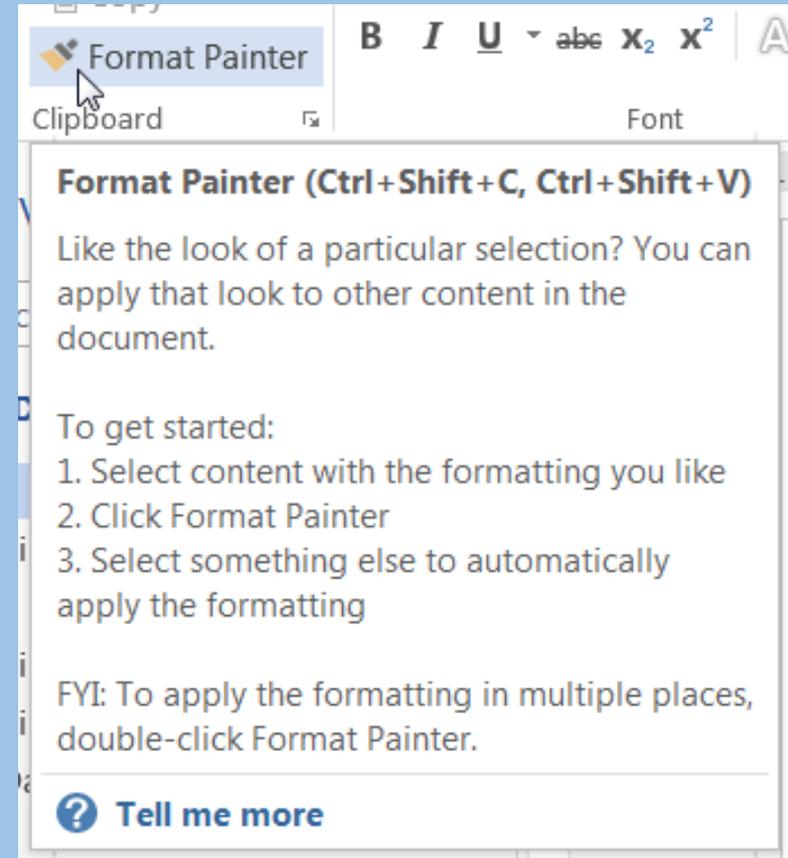


In their “pure” form tooltips are functional descriptions



They don't tell how to *locate* or how to *use* (click, drag, etc.) the UI element

Elaborated form



Infinitive subheading

Infinite subheading (optional)

Signals that steps follow immediately

[Digital Music, Instant Video & Apps](#) › [Amazon Music](#) › [Listening to Your Music](#) ›

Delete Music from Your Music Library

Music files can be deleted from your music library from a web browser on your computer.



To delete music from your music library, do the following:

1. Go to [your music library](#) .
2. Check the box or boxes next to each file you want to delete.

Tip: To select multiple songs to delete at the same time, check the box next to the first song you want to delete, press and hold the **Shift** key on your keyboard, and then check the box next to the last song you want to delete. This automatically highlights and selects all of the songs in between the two.

3. Click **Delete**.



Infinitive subheading (optional)

Can introduce multiple short procedures in a topic

Delete unneeded files and folders from your archive

No one wants an archive cluttered with large numbers of unwanted files and folders, and eventually you will reach your maximum allotted file space.



To delete one or more files or folders:

1. Check the box or boxes next to each file or folder you want to delete.
2. Click **Delete**.



To quickly delete multiple adjacent files and folders:

1. Check the box next to the first file or folder you want to delete
2. Press and hold the **SHIFT** key on your keyboard and then check the box next to the last file or folder you want to delete. This automatically highlights and selects all of the files and folders in between.
3. Click **Delete**.



How much functionality should individual procedures cover?

Short, narrowly focused procedure topics are easily digestible. But the much larger number of topics degrades findability.

A smaller number of broader topics improves findability. This is usually the better practice—even though the user has the second task of finding the desired procedure *within* the chosen topic.



Steps

“Do-it” step

User option step

Conditional step

Local purpose step



Steps (mandatory)

- Steps mark the transition from deciding to executing
 - **deciding:** *Is this the right topic for me?*
 - **executing**—*Am I following the steps correctly?*
- But a user option step throws the user back into decision-making mode

“Do-it” steps

- Consist of an imperative verb (a command), an object, and usually some modifiers (location, how to, appearance)

3. Click **Add** and then click **Browse**.

3. From the **Select Action** menu, click **Apply Configuration Changes** to configure the database and restore the backup tables.

3. Drag the hanging indent marker to the right. It's the lower triangle on the ruler.

Full sentence acting as a modifier



User option steps

- Present the user with a decision
- Usually phrased as introductory “To” clauses
- Can be appended to another step. Can be formatted as a separate step.

Appended

3. Click the files you wish to archive. To select multiple adjacent files, drag the mouse pointer over these files.

Separate

3. To open the document so that it can be read but not altered, click **Read Only**.



Deep structure vs. surface structure

Language is infinitely varied. For example, writers can substitute “You can” for “To” in a user option step.

3. Click the files you wish to archive. To select multiple adjacent files, drag the mouse pointer over these files.

3. Click the files you wish to archive. You can select multiple adjacent files by dragging the mouse pointer over these files.

Good technical writers easily recognize the deep structure beneath the surface structure in procedures



This tip is really a *lengthy* user option step. Perhaps there should be two procedures.

[Digital Music, Instant Video & Apps](#) › [Amazon Music](#) › [Listening to Your Music](#) ›

Delete Music from Your Music Library

Music files can be deleted from your music library from a web browser on your computer.

To delete music from your music library, do the following:

1. Go to your music library .
2. Check the box or boxes next to each file you want to delete.

→ **Tip:** To select multiple songs to delete at the same time, check the box next to the first song you want to delete, press and hold the **Shift** key on your keyboard, and then check the box next to the last song you want to delete. This automatically highlights and selects all of the songs in between the two.

3. Click **Delete**.



Conditional steps

- Require the user to test for a condition. If the condition is true, an action must be taken: If X, do Y
- The impediment facing the user can be trivial or serious

1. If you are in the Transactions view, switch to the Report view.

3. If the System Load indicator shows High activity, launch a subsystem before proceeding further.



Local purpose steps

- Explain the purpose of a step or group of steps
- The “to” clause *ends* the step (vs. user option step)

3. Click **Bottom** to complete the box.

- Explaining the purpose of a step can motivate users to comply:

Before starting motor, rap on filter housing to clear it of dust and ensure maximum suction.



User option vs. local purpose

1. Log in to the Admin Console. For additional information, see [Logging in to the Admin Console](#).
2. In the left menu, click **Client Configuration**.
3. Create a configuration, copy an existing configuration and modify it, or modify any configuration.
 - To create a configuration, type its name in the **Name** box under **Create a new client configuration**, select the key type if necessary, and then click **Next**.
 - To change a configuration, click its name under **Existing Client Configs**.
 - To copy a configuration, click **Copy** under **Existing Client Configs**.
 - a. Type the name of the new configuration, and then click **Submit**.
 - b. Click the name of the configuration you just created.
4. Click the **Preferences** tab [to configure your preferences](#).
For more information on Preferences, see [Setting Preferences](#).
5. Click the **Scheduling** tab [to configure scheduling options](#).
For more information on Scheduling, see [Setting Automatic Backups](#).

Feedback statements



Feedback statements (optional)

- Enable the user to verify that she did the right thing and that the system responded correctly
- Use sparingly: Use when the system response is imperceptible, easy to miss, or surprising

3. Click **Update Archives**. This process may take some time to complete.

3. Tap any note in your document.
Blue boxes appear around all the notes in the document.

Feedback statements may be formatted like steps



Connecting SlideShare on Social Profiles

How can I connect my SlideShare account to social profiles?

Last Reviewed: 01/14/2015

[Expand All](#) | [Collapse All](#)

▼ To connect SlideShare to your social profiles:

1. Log in to your SlideShare account.
2. Move your mouse over the Profile icon at the top right of the page.
3. Select **Account settings** from the dropdown menu.
4. You will be taken to the Social settings tab.
5. Click the **Connect** button to connect your SlideShare account to LinkedIn or Facebook.
6. Click the **Allow** button when prompted.

At this time, you can connect your personal LinkedIn, Facebook and Google+ accounts to SlideShare. You won't be able to connect a page or group you administer on LinkedIn or Facebook to a SlideShare account.

To display your SlideShares on Facebook, simply copy the URL of the file that you wish to share and post it as an update on your account. You can also use the share icons on the SlideView page.

Note: You cannot share privately uploaded content.



Feedback is usually provided implicitly

An introductory modifier confirms that the previous step was successful

1. On the **Options** menu, choose **Resources and Costs**.
2. On the **Resources tab**, choose **Assign Workloads.?????????**

Video narration: You can often omit what the user is *seeing*

The narrator often skips the modifiers that show how an action is carried out

The narrator might even skip the action

User option and purpose info is retained

3. From the **Select Action** menu, click **Apply Configuration Changes** to configure the database and restore the backup tables.

Video script:

.... "Now you configure the database and restore the backup tables."



Notes

Cautions and Warnings

Tips

Hints

“Note notes”



Notes (optional)

- The function of a note is emphasis
- Various kinds of information can be treated as notes
- The note heading indicates the type of note—e.g.
 - Caution:
 - Tip:
 - Note:

Cautions and warnings

- Very specific heading
- Warn about actions that might cause harm to human beings, damage to systems, or unexpected loss of data
- Must be highly visible and must appear before the place in the procedure where the user can get into trouble



CAUTION: In this beta release surnames beginning with “van” or “von” will be deleted from the system if you attempt to sort the list of names.



Tips and hints

- More general heading. Tips and hints suggest a better way to carry out a task, a desirable user option, and other useful information.

Preventing a user error



Tip: Make sure you click on the upper part of the marker—toward the tip of the triangle.
For more precise control when creating a hanging indent, see [Adjust indents and spacing](#).

Showing a better way



“Note notes”

- Most general of the note headings: Almost anything you wish to emphasize can follow “Note:”
- Use sparingly
- Especially avoid multiple notes at the bottom of a procedure—a sign of lazy procedure writing



“Note notes” can be used to show limitations



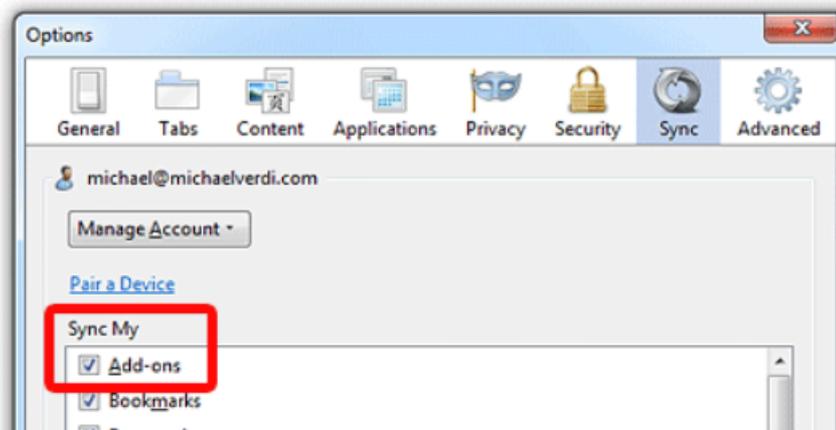
Turning on add-on sync

If you haven't set up a Sync account yet, add-on sync will be turned on when you create your account (see [How do I set up Firefox Sync?](#)). If you already have a Sync account, you can enable (or check the status of) add-on sync by following these simple steps on all the devices that have add-ons that you want to sync.

Note: Add-on sync currently only works on desktop Firefox and [Firefox for tablets](#). It doesn't work on Firefox for smaller mobile devices.

These instructions are for desktop Firefox.

1. Click the menu button  and choose **Options**.
2. Select the **Sync** panel.
3. In the **Sync My** section, check the check box next to **Add-ons**.



Summing up: This is enduring knowledge

Favored practices change from year. But the underlying principles you've learned today never change.

Put the ryng of thyn Astrelabie upon thy right thombe, and turne thi lift syde ageyn the light of the sonne.



Geoffrey Chaucer

A Treatise on the Astrolabe, 1391

