

Unit III: Instruction Assignment

Final Instructions and Usability Test Report due April 6

Project Description

In your careers, you will likely be asked to explain, in clear terms, how to perform a complex task. This project provides you practice doing just that. For this project, you will compose a set of instructions for a specific task, test the instructions through usability testing, write a short report on the results of your testing, and then revise the instructions based on the results of the testing.

Stage 1: Decide on a Task that Requires Instructions [memo due 3/18]

For this project, you should select a technical task that you have expertise in and that can be performed by a test audience in class. The task might involve building something (e.g., a house of cards), installing a program (e.g., anti-virus software), or carrying out an activity (e.g., assembling a fly rod). Avoid any task that is too simplistic or any task so familiar and common that your users could perform it without reading your instructions.

Keep in mind that your instructions should:

- include about 20 steps (could include multiple procedures that total about 20 steps),
- contain at least five visuals that you create,
- and be possible to test in class in 15 minutes or less

Describe your project in a **one-page memo** addressed to me. When writing this memo, please include the following sections with headers (include additional sections, if needed):

- **Project Description.** Describe your project. What are you writing instructions for? What is the process you will help readers complete? Describe the parts of the process (“the reader needs to be able to do X, then Y”).
 - **Project Elements.** Describe the elements of your project *and* your rationale for including each element. What will you include in your instructions? Will you need numbered steps? Diagrams? Flowcharts? Lists? Safety warnings? Feedback statements? A troubleshooting section? What visuals (photographs, symbols, drawings) will you use? While listing elements, don’t forget to describe their purposes (“I plan to include a warning about X, so that readers will be able to…”).
 - **Rhetorical Situation.** Analyze the rhetorical situation of the instructions by answering the following questions: Who is the target audience? Be specific. What are the needs of your reader/user, both from this document and in general for this topic? What biases, values, and expectations might the reader have? What is the target audience’s level of familiarity with the task? What will they need to know? How will your target audience use the instructions? How will the intended use of the instructions influence your document’s design? How will the environment in which the instructions are going to be used impact the document’s design? (e.g., If you are writing instructions to be used outdoors, do the instructions need to be waterproof?)
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Stage 2: Write Instructions [draft due 3/23]

Write reader-oriented instructions, considering your analysis of the rhetorical situation. Make sure that you consider every aspect of the document you produce, from language and organization to visual elements and document design.

Also, include information relevant and pertinent to your audience and purpose, such as a title, table of contents, list of tools, materials, equipment, explanations, hazard messages and warnings, troubleshooting, index, legal information, and other similar information as needed. Consider your users and what they might want, expect, or need.

As a reminder, your instructions should:

- Be over a technical task,
- Be addressed to a non-technical (or lay) audience of your classmates.
- Be possible to test in our classroom in 15 minutes or less.
- Contain about 20 steps.
- Contain at least five visuals or screen captures that you created.
- Incorporate screen shots, text boxes, callouts, arrows, and other graphics, where necessary
- Follow the principles of good technical instructions discussed in class and in our textbook.

Make sure you keep all drafts of your instructions. It is probably a good practice to print out the current draft of instructions at the end of each work session.

Step 3: Conduct Usability Testing [3/23, 3/30-4/1]

We will spend three classes testing instructions. During the first round of testing, you will conduct one usability test, and during the second round, you will conduct two. To conduct the usability tests, you will distribute a set of your instructions and the necessary materials to classmates, who will test your instructions (by reading them out loud and following them) while you observe and take notes. On the days of your usability tests, you must bring enough materials for the number of tests that will be performed during that class period.

In order for your classmates to perform an successful usability test, you must have a complete draft of instructions (including 20 steps and 5 graphics). *If you come to your assigned Usability Test day with an incomplete draft of your instructions, I will deduct 10 points from your paper grade. I will do the same if you do not attend your Usability Test day. Not attending when you are to be the tester will result in a significant point deduction as well.*

When conducting your usability test, carefully observe the person testing the instructions and take notes (which will be turned in with your final project). When did the person pause and reread an instruction? When did the person skip a step? Did the person complete the task effectively? You will want to ask the tester to think out loud while completing the instructions, and/or you should ask the person for feedback on how you could revise the instructions to make them more effective.

After the usability test, you will discuss with your tester his/her experience completing the task. Your tester should provide constructive feedback on the instructions, paying special attention to how the document is reader-oriented, in terms of language, organization, visual elements, and overall design. Testers should be as specific as possible, pointing out at least two positive aspects of the document, and making at least two suggestions for revision.

Stage 4: Revise Instructions and Write Usability Test Report [drafts due 4/4]

Revise your instructions based on the feedback you received from your usability testers. You may want to conduct more usability tests. I recommend testing your instructions with at least one person who represents your target audience and is not a member of our class. Use the usability testing guidelines in the section above. You should repeat usability tests until users have no difficulty following your instructions.

Then, write a **2-3 page usability test report** describing the process of writing and testing your instructions, including the results of your usability tests, problems with the original sets of instructions, findings and recommendations for revision, and revisions you made as a result of your usability tests. This report should follow professional memo format and be addressed to me.

You will peer review these documents and revise them once again before turning in the completed project.

Stage 5: Write Cover Letter and Submit Project [due 4/6]

Write a professional **cover memo** addressed to me that answers the following questions:

- How are your instructions reader-oriented in terms of language, organization, and visual elements?
- How did you revise based on feedback?
- How does your document meet the needs of your target audience?
- What did you learn about technical writing and design through this project?

Final Project Contents (turned in in-class, in a folder)

The Instruction Assignment folder should contain the following:

____ Cover letter

____ The final version of instructions (clearly labeled as “FINAL”) – *turn in on Canvas*

____ Usability test report (2-3 pages) – *turn in on Canvas*

____ Draft of instructions for usability test (marked as “usability test instructions”)

____ Notes from usability testing

____ All earlier drafts of instructions

You must print these instructions, preferably in color (if graphics are in color). Do not wait until the last second to try to print this document, as you may run into difficulties. Please note that converting to PDF may be necessary for uploading purposes. Canvas has difficulty with larger files. You may submit the instructions and usability test report as separate files.