Top Procedures

Related Links

- General Standards
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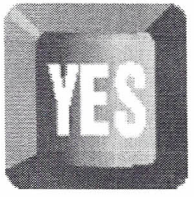
Procedural information provides the steps that a user must follow in order to complete a task.

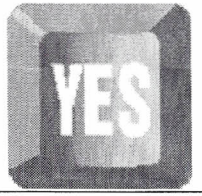
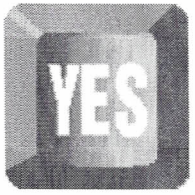
Use ordered lists to describe tasks with multiple steps. If a procedure takes more than 10 actions, consider breaking it into smaller, more manageable sub-procedures.

Click the **QUICK TIPS** button to display additional information.

How to Introduce a Procedure

- Start with an opening paragraph that introduces the procedure and provides the context for it. Give location first, action second.
- Use an imperative sentence or an infinitive phrase to define the scope; punctuate the end of the statement with a colon.

	Installing My Reports Manager *1. Click Install Program.* *2. Select a feature.* *3. ...*
	***Installing My Reports Manager*** *To install My Reports Manager:* *1. Click **Install Program.*** *2. Select a feature.* *3. ...*
	Installing My Reports Manager *Use the following procedure to install My Reports Manager.*

	***Steps*** *1. Click **Install Program**.* *2. Select a feature.* *3. ...*
	***Installing My Reports Manager*** *To install My Reports Manager, complete the following steps. This procedure will install the program in the default location.* *1. Click **Install Program**.* *2. Select a feature.* *3. ...*

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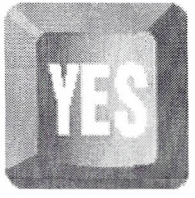
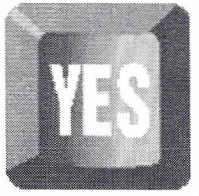
How to Describe the Steps

- Write one step for **each** significant user action.
- Use arrows to show a sequence of menu selections.
- Start the first sentence of each step with an imperative (Click, Select, Press, etc.).
- If an ellipsis (...) is included in the label, do **NOT** include the "..." in the description.

	1. ... *2. Click **File**.* *3. Click **Print...*** *4. ...*
	*1. ...* *2. Click **File --> Print**.* *3. ...*

- If the user must press the **Enter** key to complete the action, include it as part of the step, **NOT** as a separate step.

	1. ... *2. Type your first name.* *3. Press **Enter**.* *4. ...*
	*1. ...* *2. Type your first name, then press **Enter**.* *3. ...*

- **Do NOT use "please"** in any instructions.
- When a task consists of only one step, write it as a short sentence and do **NOT** number it.

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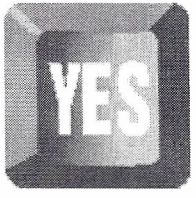
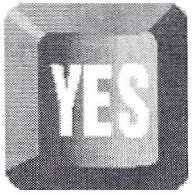
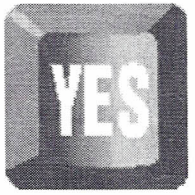
How to Describe the Results of a Step

- **Never** describe the results of a step in the next step.

	*1. Click **Install Program**.* *2. The Installation window lists the available features.* *3. Select a feature.* *4. ...*
	*1. Click **Install Program**; the Installation window displays.* *2. Select a feature.* *3. ...*

	1. *Click **Install Program**. The Installation window displays.* 2. ***Select a feature.*** 3. *...*
	1. *Click **Install Program**.* 2. *In the Installation window, select a feature.* 3. *...*

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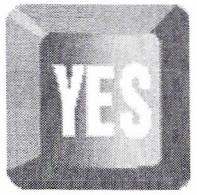
How to Describe Non-Sequential Steps

- Do **NOT** write non-sequential steps in a sequential manner.
- Present the branching condition in a single step, using a sub-list for the alternative actions.
- Avoid using "or" between alternatives.

	3. *If you have previously saved your report, click the **Save** icon and go to step 5. **OR*** 4. *If you have NOT previously saved your report, click the **Save As** icon and type a report name.* 5. *...*
	3. *Use one of the following procedures:* ▪ *If you have previously saved your report, click the **Save** icon.* ▪ *If you have NOT previously saved your report, click the **Save As** icon and type a report name.*



4. ...

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How to End a Procedure

- A step-by-step procedure usually ends with the user saving the work; avoid closing any open windows or returning to a previous point.
- Never include actions that are outside the scope of the procedure.
- Do **NOT** include steps for another procedure.
- Direct the user to any subsequent procedures by including a cross-reference or a link in the final step.