



# Documentation Best Practices

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Strategies for Success with Work Instructions, Standard Operating Procedures, Training Material, and More...

# About Me

## Ron Davis

Director of Professional Services, Dozuki

- Providing technical expertise and document conversion services to all Dozuki customers
- Located in Northern California



# Documentation Best Practices

- Writing Work Instructions
- Photography and Visuals
- Organizing Your Content
- Converting to Electronic Work Instructions
- Q and A

# Being Concise

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Be direct and get to the point. Then stop writing.

# Making paragraphs more concise:

- Lead with the most important information.
- Get rid of unimportant information.
- Avoid narratives and anecdotal information.
- Check your word count.

# Making sentences more concise:

- Short sentences are your friend.
- Dump any empty words.
- Reduce the amount of “to be” verbs.
- Use passive voice strategically.

# Use Dozuki's structure as a framework

- Break complex procedures down into easily followed steps.
- Use character limits, photo limits, and bullet limits to guide how you parse instructions.
- If you have too much content for one step or one bullet, it's a good sign that you need to break it up.

# Crystal Clarity

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Avoiding confusion: a commonsense approach

Imagine your words are a sliding glass door.

Now imagine smashing into the glass door—hard.

That's how clear your writing should be: dangerously clear.

# Crystal clarity

- Use plain language.
- Don't turn verbs into nouns.
- Articles are not the enemy.
- Use words for quantities.

# Using plain language

When the process of freeing a vehicle that has been stuck results in ruts or holes, the operator will fill the rut or hole created by such activity before removing the vehicle from the immediate area.

VS.

If you make a hole while freeing a stuck vehicle, you must fill the hole before you drive away.

# Don't turn verbs into nouns

With the control levers (handles) fully depressed:

for the clutch—complete disengagement of the engine from the transmission; smooth shifting of gears means correct adjustment of the clutch cable.

VS.

Completely disengage the engine from the transmission. Correctly adjust the clutch cable for smooth shifting gears.

# Articles are not the enemy

- Articles tell the reader that a noun is coming.
- Dropping articles forces the reader to fill in the blanks.
- Dropping articles can cause readers to stumble or backtrack to find missing words.

# Articles are not the enemy

“Disconnect cord from wall”

or

“Disconnect the cord from the wall.”

# Use words for quantities

Write numbers in words for quantities under 100.

Remove three 1.2 mm Phillips #1 screws.

vs.

Remove 3 1.2 mm Phillips #1 screws.

or

Remove (3) 1.2 mm Phillips #1 screws.

or

Remove three (3) 1.2 mm Phillips #1 screws.

# Audience

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Write for your reader,  
not yourself.

Writing never takes place in a vacuum (unless you're literally in a vacuum, which would be incredibly uncomfortable).

**The average American adult reads at  
a ninth-grade level.**

# Writing for your audience

Write for your audience's reading level.

## **A safe rule of thumb:**

Work instructions shouldn't be more difficult to read than Shakespeare.

# Writing for your audience

Consider your reader's existing knowledge and level of experience.

- Will all of your readers be familiar with your line?
- Will people from other departments or other facilities use these instructions if a line is down?
- Are there terms, nicknames, or colloquialisms that your readers need to know.

# Photography and Visuals

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They say a picture is worth a thousand words.  
They're right.

Don't just tell readers how to do  
something—show them.

# Tips for photography

- Shoot bright, clear photos that focus on the action.
- Use hands or tools to demonstrate the action of the step.
- Shoot photos from the perspective of the operator.
- Use multiple photos to show motion.

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# Tips for photography

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# Tips for photography

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# Tips for photography

Use multiple photos to show complex actions.



# Tips for photography

Use multiple photos to show complex actions.



# Video instructions

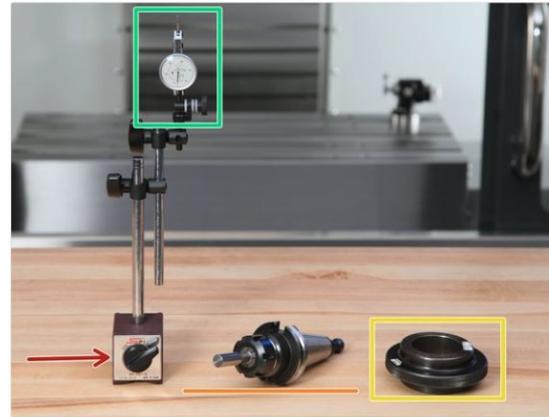
Use videos to show motion and help readers gain a better understanding of a process



# Bullets and markup

- Use markup to highlight components, fasteners, or switches.
- Color coordinate your bullets to the markup on your images.
- Use special bullets to make important information stand out for your readers.
  - **Caution:** for situations where the device or reader could be damaged
  - **Note:** for information other than instructions, which might be helpful to the reader.
  - **Reminder:** for information that is helpful or necessary after the step or procedure.

## Step 6 Calibration Tools:



- Magnetic Base to mount the Indicator
  - "Calibration Bar", generally consisting of a 1/2" or 12 mm gauge pin clamped in a collet style toolholder.
  - Test Indicator accurate to 0.0005" or 0.013 mm
- ⓘ An accurately bored hole in a part or fixture can also be used in place of the Ring Gauge fixture.



# Prerequisite Procedures

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When you're writing a lot of instructions for a single device or machine (or lots of similar devices), reusing content saves time, work, and space.

# Prerequisite procedures

- Use prerequisite procedures like building blocks to construct larger, more complex guides.
- Prerequisite procedures save time when authoring and revising documents.
- Prerequisites help to standardize each procedure.
  - They prevent “forking” caused by multiple authors.

# Prerequisite procedures

← Station 1 - Assembly LT 3X70 Edit Operator View Options

v2.0 M APPROVED Manufacturing - LT 3X70 09/09/2019 by Brian Sallee Details

## Station 1: Operator 2 - Assembly LT 3X70

Written By: Brian Sallee (and 2 other contributors)

Guide ID: 30 Comments: 2 Favorites: 2



Difficulty	Moderate
Steps	15
Time Required	00:28:00 - 00:32:00
Sections	14
Flags	0

**Tools**

- Safety Platform
- Cummins Inline-5 adapter
- Laptop
- Stopwatch

**Parts**

- USB Cable View

# Prerequisite procedures

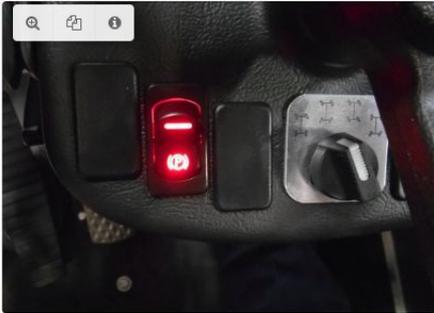
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**Tools**

- Safety Platform
- Cummins Inline-5 adapter
- Laptop
- Stopwatch

**Difficulty** Moderate

**Steps** 15

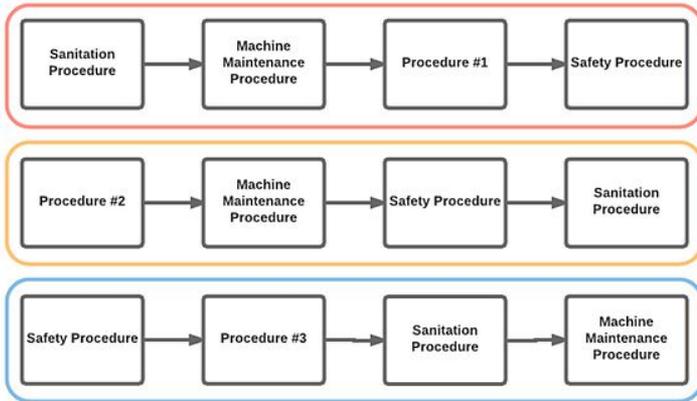
**Time Required** 00:28:00 - 00:32:00

**Sections** 14

- Install Safety Platform (6 Minutes) 1 step
- Verify Transmission Operation (5 Minutes) 1 step
- Bring Transmission Up To Running Temperature (3 Minutes) 1 step
- Time The Winches (3 Minutes) 1 step
- Check Fault Codes And Parameters (20 Minutes) 1 step
- Program IQAN (15 Minutes) 1 step
- Start The Crane (12 Minutes) 1 step
- Set Options And Pulse Display (25 Minutes) 2 steps

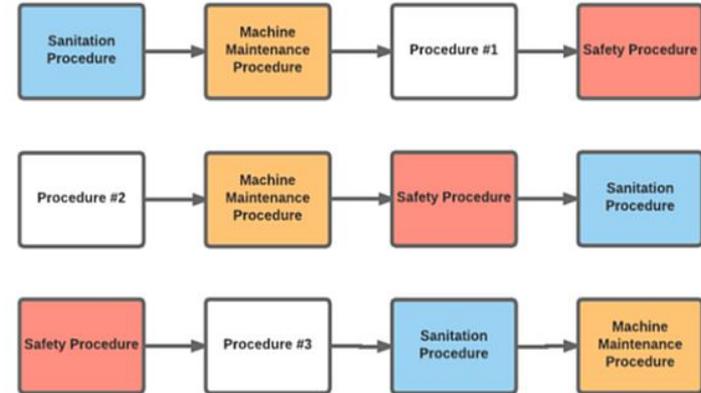
# Prerequisite procedures

## Isolated

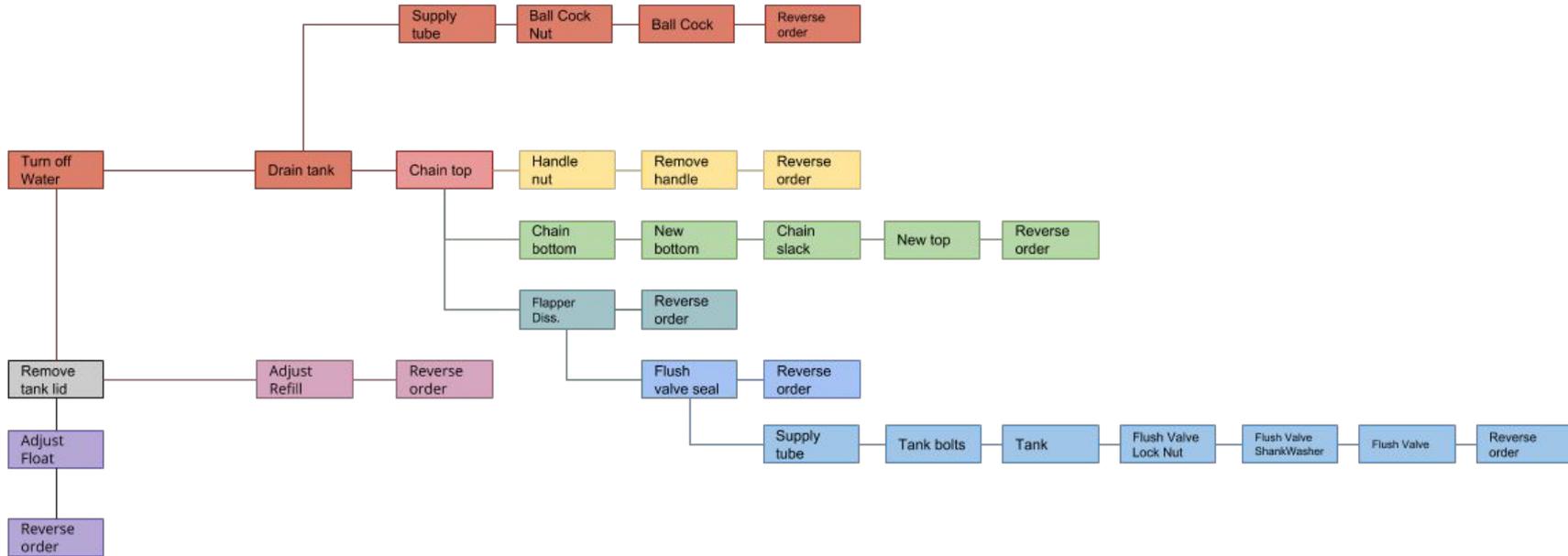


VS.

## Modular



# Prerequisite procedures



# **Converting to Electronic Work Instructions**

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# Converting to Electronic Work Instructions

- Archive or omit previous revision records.
- Break legacy documents apart into discrete work instructions.
- Use tools to export images from existing work instructions.
- Use approval processes to confirm accuracy.
- Leverage skilled consultants like Dozuki's Professional Services team.

# Recap: Documentation Best Practices

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- Photography and Visuals
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# Questions?



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