

Checklist: Usability of Instructions

Use this checklist to evaluate the usability of instructions. (Numbers in parentheses refer to the first page of discussion.)

Content

- ☐ Does the title promise exactly what the instructions deliver? (495)
- ☐ Is the background adequate for the intended audience? (496)
- ☐ Do explanations enable users to understand what to do? (496)
- ☐ Do examples enable users to see how to do it correctly? (496)
- ☐ Are the definition and purpose of each step given as needed? (508)
- ☐ Is all needless information omitted? (501)
- ☐ Are all obvious steps omitted? (501)
- ☐ Do notes, cautions, or warnings appear whenever needed, before or with the step? (502)
- ☐ Is the information rate appropriate for the user's abilities and the difficulty of this procedure? (501)
- ☐ Are visuals adequate for clarifying the steps? (496)
- ☐ Do visuals repeat prose information whenever necessary? (506)
- ☐ Is everything accurate? (495)

Organization

- ☐ Is the introduction adequate without being excessive? (507)
- ☐ Do the instructions follow the exact sequence of steps? (502)
- ☐ Is each step numbered, if appropriate? (505)
- ☐ Is all the information for a particular step close together? (506)
- ☐ For a complex step, does each sentence begin on a new line? (508)
- ☐ For lengthy instructions, is a layered approach, with a brief reference card, more appropriate? (506)
- ☐ Is the conclusion necessary and, if necessary, adequate? (508)

Style

- ☐ Does the familiar material appear *first* in each sentence? (504)
- ☐ Do steps generally have short sentences? (504)
- ☐ Does each step begin with an action verb? (503)
- ☐ Are all steps in the active voice and imperative mood? (503)
- ☐ Do all steps have parallel phrasing? (504)
- ☐ Are transitions adequate for marking time and sequence? (505)

Page Design

- ☐ Does each heading clearly tell users what to expect? (505)
- ☐ On a typed page, are steps single-spaced within, and double-spaced between? (505)
- ☐ Is the overall design simple and accessible? (506)
- ☐ Are notes, cautions, or warnings set off or highlighted? (506)
- ☐ Are visuals beside or near the step, and set off by white space? (506)