PRODUCT — STUDY

INSTRUCTION OF DESIGN

MANUALS ASPECTS

# PRODUCT INSTRUCTION MANUALS A STUDY OF DESIGN ASPECTS

SPECIAL PROJECT

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DIPAN SHAH

IDC 1985

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#### 1 INTRODUCTION

Product Manuals are an essential part of the product. They are given along with the product. They are very important as they establish a better relationship between the product and its user. To a user it gives a better understanding of the product and also its potentials.

Very often, Product Manuals are badly designed.

Most often they give misleading information which makes it very difficulty to understand the product completely. Sometimes they also give insufficient information which conceals from the user the full potentials of the product.

By and large, in India, Product Manuals are not given the professional attention they deserve - both for the text and for the

illustrations. They are designed in a very casual manner or rather left unattended completely. The textual part in most of the Manuals is prepared by the employees of lower ranks in industries. These are usually freshly appointed engineers who just make a list of the matter to be given in a manual. This matter is then arranged in a slightly better way by the advertising department which finally results in a badly designed manual.

Hence it was decided to study and analyse a few product manuals, identify the typical problems and the areas of improvement and also suggest a methodology for a better design.

Several Product Manuals were collected for this purpose. These were ranging from a single page/flap to more detailed booklets

Also a few foreign Manuals were collected along

with the Indian Manuals.

It is hoped that it will serve as a useful guide to design a better Product Manual. It can be used by Graphic Designers, Advertising Departments etc. It can also be used by Product Designers who can help the company to design a good manual for their products.

### 2 PRODUCT INSTRUCTION MANUALS

A Product Instruction Manual gives information about the product as regards its assembly, installation, mode of use, cleaning, maintenance etc. It thus gives a better understanding of the product to the user.

Product Manuals vary in size and shape from product to product. It ranges from a single page or a flap to a more detailed booklet of about ten - twenty five pages to a thoroughly detailed book of about hundred pages or more like an Aircraft Manual. Also the number of languages vary from one to twelve or even more.

### 3 CLASSIFICATION OF PRODUCT MANUALS

Based on the type of information given, product manuals can be classified into the following five categories -

- INSTALLATION/ASSEMBLY MANUALS
- OPERATION INSTRUCTION MANUALS
- USER INSTRUCTIONS AND SALES LITERATURE
- USE SUGGESTIONS
- SERVICE BULLETINS

LIT, BERLINGS.

These five categories of manuals are quite distinct from each other and the amount of information given in each category varies from product to product although the quality and the type of information remains essentially of the same kind.

For example, an assembly manual for a pen will

show how to assembly its various parts and also how to replace a refill. This may be shown with the help of visuals on the box or casing itself or on a single page. But an assembly manual for a kitchen appliance will be more elaborate and detailed and also given in a booklet form.

This shows that the core content of each category does not change from manual to manual irrespective of the number of pages and the number of languages. Thus the amount of information may vary from manual to manual, but the kind of information given in each category will be same.

The kind of information given in each category has been dealt with in this report.

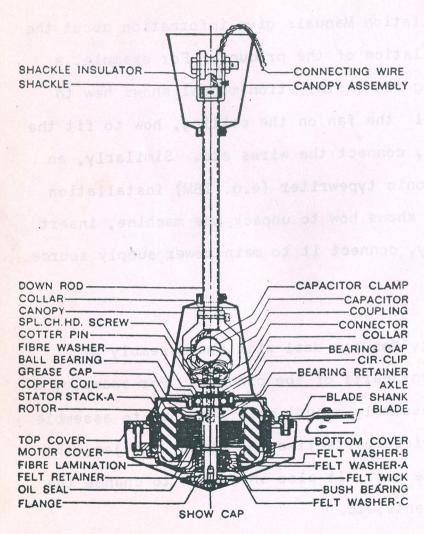
### 3.1 INSTALLATION/ASSEMBLY MANUALS

Installation Manuals give information about the installation of the product. For example, a ceiling fan installation manual shows how to install the fan on the ceiling, how to fit the blades, connect the wires etc. Similarly, an electronic typewriter (e.g. IBM) installation manual shows how to unpack the machine, insert the key, connect it to main power supply source etc.

Assembly Manuals deal with the assembly of different parts of the product. For example, a mixer assembly manual will show how to assemble the various parts like the blade, the jar, the top dome etc. It also shows how to change the attachments, etc.

A few examples showing the typical problems

### SECTIONAL KEY DRAWINGS



## INSTRUCTIONS FOR INSTALLATION

- 1) For optimum air-displacement, the height between the plane of rotation of the blades and floor is recommended to be between 9' and 10'.
- 2) The Ceiling Fan must be connected to 220V/230 V, 50 c/s, A. C. supply.
- 3) It is necessary to remove paper wrappings from all the components and paper ring between the Top Cover and Motor Cover. The Blade, Regulator, Motor and Canopies etc., should be cleaned to remove the traces of dust, if any.
- 4) Remove the sleeving and unscrew collar from the Down Rod and slip the Canopy assemblies on to the Down Rod so that the Canopy assembly with "R" logo comes on to the Shackle Side of the Down Rod and without "R" logo on the Coupling side of the Motor.
- 5) Screw the Down Rod with the Coupling and fix the Cheese Head Screw. It is very important to see that the collars are tightened fully to the Coupling.
- 6) Connect the Blue and Red Connecting Wires which are already in position in the Down Rod to the Connector as shown in the diagram. Fix the Canopy assembly in position by tightening the Grub Screws Take care to see that Canopy does not foul with Top Cover.
- 7) Fix the three Blades in position by tightening the Cheese Head Screws along with their respective Spring Washers taking care to see that the screws are tightened fully and also Blades are not mishandled to avoid misalignment.
- 8) Fix the Show Cap on the Axle.
- 9) Clean the Fan finally with a wet cloth.
- 10) Hang the fan on a proper hook. Connect the Red and Blue connecting wire to the supply mains. Push up the Top Canopy assembly in position and tighten the Grub Screws.

## RALLIFAN

in Installation/Assembly Manuals are
illustrated in the following pages.

#### EXAMPLE 1

A CEILING FAN (RALLI FAN)

#### TYPICAL PROBLEMS

- No visuals to show the sequence in installation
- o of the product.
- The diagram given has no relation with the steps
- O involved in the installation.
- The picture is too black.
- The picture is too complex.
- Parts are not numbered.

## The stainless steel jar and accessories

The standess steel jat is provided with three removable blade assemblies for wet and dry grinding, whipping, liquidising, and blending, and a seethrough acrylic dome so you can check circulation. Inside is a shaft on which the blade assemblies are fixed. (See 'How to Connect on pg. 6. )

The total capacity of the stainless steel jar is one litre. The assembly for dry grinding can also tackle small quantities of tough wet grinding- to 1 litre at a time - (Fig. a).

The assembly for wet grinding in large quantities (Fig. a) can grind up to } litre at a time.

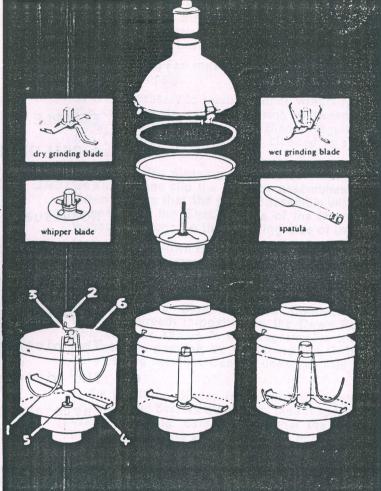


It can also be used for liquidising and blending.

Whipping is best done with the third attachment. (Fig. a)

Fix appropriate blade by gently screwing down on shaft in anti-clockwise direction with spanner (provided with spatula) until it is firm. Attach rubber ring to bottom of acrylic dome. The rubber ring and dome should fit snugly on groove of jar. Fasten clips. Acrylic cap should be used to seal opening on dome before running machine.

Do not operate jar unless lid is in position.

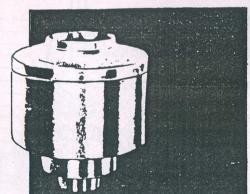


### **New Sumeet Kneading Attachment**

The kneading attachment (Fig. b) is an aluminium jar which comes with an aluminium lid having a circular opening through which ingredients can he added.

To fit the aluminium lid, place it on the attachment so that the rivets on the attachment fit into the slots on the sides of the lid. Rotate till firm

The kneading attachment is provided with a blade assembly and an additional hook for cake mixing. Instructions for fitting are given below



SUMEET KITCHEN MACHINE

A KITCHEN MACHINE (SUMEET)

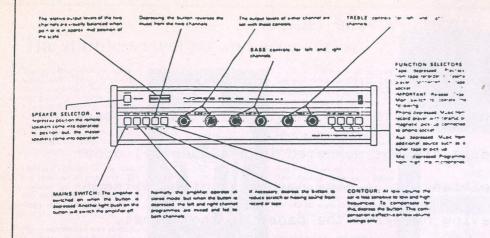
TYPICAL PROBLEMS

No visuals to show the installation sequence

Parts are not numbered in a sequential order

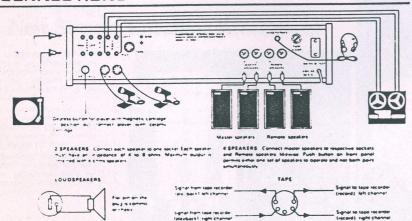
Reference to a page number is given without

having numbered the pages of the manual.



FRONT SIDE

#### CONNECTIONS



BACK SIDE

NORGE AMPLIFIER

## EXAMPLE 3

A STEREO AMPLIFIER (NORGE)

#### TYPICAL PROBLEMS

- Arrows are drawn haphazardly
- Connections shown complicates the figure
- o visually.
- No proper connection of detailed figure of
- o parts with the main figure.

Similarly other product manuals were also analysed and the typical problems in each of them were noted. From this, a list of typical problems seen in Installation/Assembly Manuals was made.

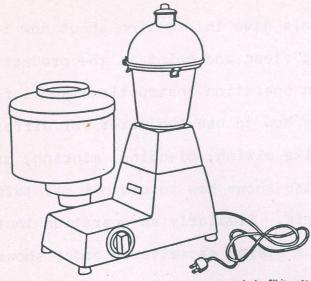
- TYPICAL PROBLEMS IN INSTALLATION/ASSEMBLY MANUALS
- Installation instructions are not given in a
- o proper sequence.
- No visuals to show the installation sequence.
- The diagram/picture given has no relation with
- o the steps involved in installation.
- The visuals are too dark (too black)
- The visuals are too complex
- No diagram showing the different parts of the
- o product.
- Parts are not shown clearly.
- Parts are not numbered at all.
- Parts are not numbered in a sequence.
- The specific activity being shown is not clearly
- o identified.
- Arrows are drawn haphazardly.
- Connections between parts are drawn such that it
- O creats a visual complexity.
- Parts information and part list are not in the
- o same order.

#### 3.2 OPERATION INSTRUCTION MANUALS

These manuals give information about how to use or operate, clean and maintain the product. For example, an operation instruction manual for a mixer shows how to use the mixer for different purposes like mixing, blending, mincing, grating etc. and also shows how to clean & maintain the various parts. Similarly an operation instruction manual for a stereo cassette recorder shows how to operate the various knobs and switches and also shows how to clean and maintain the parts like the heads, pinch roller, capstan etc.

A few examples showing the typical problems seen in operation instruction manuals are illustrated in the following pages.

## How to connect your New Sumeet Kitchen Machine



ing, begin with the lowest speed have finished, switch off kitchen with water once more. Dry (1) and if necessary, increase the machine at "off" position.

New Sumeet is provided with a speed in steps to the maximum. To clean the jar, fill it up to the 5 Amp 3-pin plug and a 2-metre As a general rule, coarse mixing height of the blade with water connecting cord.

As a general rule, coarse mixing height of the blade with water should be done at slow speed and a little soap flakes. Run New Sumeet is provided with a and for fine paste, the speed motor for 2/3 secs., using any 3-speed switch. When operat-

Note: Before starting machine for the first time, or after long storage periods or long distance shifting, rotate the motor shaft by hand through the bakelite coupler till you can feel the shaft is seated properly, and also that it is rotating freely. THIS IS A MUST.

## Cleaning and Care

the stainless steel jar, remove spatula. Clean and store. the blade assembly by gently Do not attempt to repair the Sumeet dealer. He will assist you.

unscrewing in a clockwise kitchen machine at home. Leave direction, with the spanner it to the experts at our autho-

When you have finished using provided on one end of the rised service stations to set it right for you or contact your

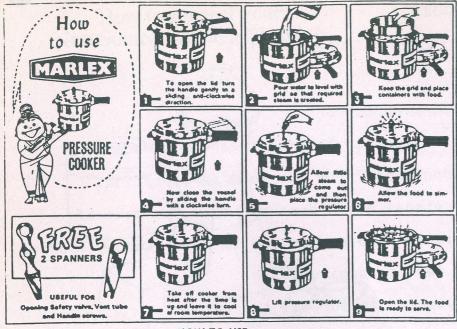
## SUMEET KITCHEN MACHINE

#### EXAMPLE 1

#### A KITCHEN MACHINE (SUMEET)

#### TYPICAL PROBLEMS

- Title given is incomplete and misleading.
- It does not show the mode of operation.
- The visual given does not show the mode of
- O operation and connection to power supply source.
- The text is ambiguous.
- No visuals to support the text
- 'Note' not given proper importance.
- 'Dont's' are mixed up with the cleaning
- O instructions.



#### HOW TO USE

- Put Grid in the Cooker before you place the food.
- 2. Place food as well as proper quantity of water in Cooker and fit the cover
- PLACE COOKER OVER HIGH HEAT UNTIL STEAM RISES FROM THE VENT TUBE IN A STEADY FLOW AND THEN PLACE THE PRESSURE REGULATOR ON THE VENT TUBE I. . . PLACE THE REGULATOR AFTER THE AIR IS REMOVED FROM COOKER. IF THE AIR REMAINS INSIDE, FOOD WILL NOT BE COOKED QUICKLY AND FURTHER IT MAY DISCOLOUR CERTAIN VEGETABLES LIKE POTATOES AND CAULI FLOWER.
- 4. COOKING TIME BEGINS ONLY AFTER A WHISTLE IS HEARD AND NOT AFTER THE PRESSURE REGULATOR HAS BEEN PLACED.

#### HOW TO OPEN THE COOKER

WHEN THE COOKING TIME IS UP, LIFT PRESSURE REGULATOR WITH A LONG HANDLE FORK IN ORDER TO ALLOW STEAM TO ESCAPE, AND THEN REMOVE THE COVER.

- IT IS DANGEROUS TO OPEN THE COVER WHILE STEAM IS STILL INSIDE THE COOKER.
- Open the Cooker by turning cover in the Anti-Clock wise direction so that arrow on the cover matches with the arrow on the Vessel of the Cooker. Now tilt slightly to remove cover.

#### HOW TO CLOSE THE COOKER

Close the Cooker by placing the cover on Cooker so that arrow on the cover is in line with the arrow on the Vessel. Press Down the cover and turn it in the Clock-wise direction until the handles are parallel to each other.

## MARLEX PRESSURE COOKER

#### GIVE IT A LONG LIFE

Clean all the metal parts of your Cooker with warm soapy water. Then rinte and wipe immediately. Water drying on the aluminium dulls the shine of the polished surface.

NEVER USE ash or abrasive cleaning powders to clean any part of your Pressure Cooker. Use only plain soap and water and soft steel wool.

DO NOT tap spoons or ladles against the rim of your Cooker. This will dent the rim and prevent complete sealing.

Certain properties of water and certain minerals in food cause a darkening on the surface of aluminium. This is quite harmless, the discolouration does not affect the aluminium itself or the food cooked in it in any way. When this discolouration occurs, it can be removed with an aluminium cleaner, such as steel wool or Tartaric acid...

#### EXAMPLE 2

#### A PRESSURE COOKER (MARLEX)

#### TYPICAL PROBLEMS

- No proper correlation between the visuals
- (inside cover page) and the instructions given
- O inside (page 8)
- Visuals are too dark (too black)
- Not much importance is given to cleaning and
- o maintenance instructions.
- No visuals to support the text for cleaning

#### INSTRUCTIONS FOR USE

#### PRELIMINARY

Make sure that the Cabinet is perfectly clean and wash the shelves and freezer (evaporator).

Any dirt-marks should be carefully removed with a cloth moistened in soap and water.

NO OTHER CLEANING LIQUID SHOULD BE USED FOR THIS PURPOSE: Before putting the Refrigerator into normal use, it is advisable to leave the cabinet door open for 24 hours with the current switched off.

This allows for any odour of packing or newness to disperse before food is stored in this space.

#### OPERATIONS

Switch on the current and turn the temperature control to a suitable setting. In tropical climates a cabinet temperature below 8° C is usually satisfactory.

The temperature control dial has eight settings from 1 (Warmest) to 8 (coldest) plus Defrost and Off. Initially set the dial at 4. After using the refrigerator, adjust dial to a setting that is best suited to your need.

When switching from No. 1 to a higher number, the control knob should be turned in the direction of the arrow marked on it, and when switching from No. 8 to a lower number, the control knob must be turned in the reverse direction. If the knob is at the 'OFF' position, it must be turned only in the direction of the arrow.

#### SIMPLE FOOD RULES

Put fresh food in the cabinet to keep it fresh. Never put stale food in the Cabinet.

All food kept in the refrigerator must be covered. Foods which are strongly flavoured, e.g. cheese, stock or flavoured left over cooked foods, are liable to transmit their flavour or odour to other foods, such as butter or milk, unless they are closely covered.

Butter, margarine and other fats should be left in the original wrapping paper until required, and odd amounts in containers with covers on. Keep milk in the bottle in which it is delivered with the cap in place, even if partly used. Always wipe milk bottles before placing them in the cabinet-

Wash all salad foods and store them in the crisper, particularly lettuce.

Uncooked meat or fish should be stored in the freezer.

To facilitate storage of food, also to assist in the circulation of air in the cabinet, avoid using large plates (whenever possible) Wrap small portions of food in grease-proof paper.

Tins should only be piaced in the cabinet to chill for about one hour, i.e. when serving tinned meat to set the jelfy.

BANANAS, PEACHES, MUSHROOMS AND MELONS SHOULD NOT BE STORED IN A REFRIGERATOR.

## GODREJ REFRIGERATOR

#### EXAMPLE 3

#### A REFRIGERATOR (GODREJ)

#### TYPICAL PROBLEMS

- Text is too bookish (continuous),
- 'Do's and 'Dont's' are mixed up with the text
- o for use instructions.

Similarly other product manuals were also analysed and the typical problems in each of them were noted. From this, a list of typical problems seen in Operation Instruction Manuals was made.

- TYPICAL PROBLEMS IN OPERATION INSTRUCTION MANUALS
- Operation instructions are not given in a proper
- O sequence.
- No visuals to show the use, cleaning and
- O maintenance instructions.
- Visuals, if given, are too dark (too black).
- There is no proper correlation between the text
- O and the visuals.
- The text is ambiguous.
- There is no proper differentiation between the
- O use instructions and user instructions like
- O warnings, notes, do's and dont's etc.
- There is no arrangement to have a constant
- O reference to product figure while going
- O throughout the instructions.

#### 3.3 USER INSTRUCTIONS AND SALES LITERATURE

User Instructions include information like
Warnings, Cautions, Do's & Dont's, Important
Safeguards, Notes, Points to Remember, Special
Tips etc.

Sales literature includes Cover Pages, Guarantee Cards, Technical Specifications of the products, Information about the other products of the Company, Free Gifts given along with the product etc. presented in a glamorous manner, so as to persuade the consumer to buy the product.

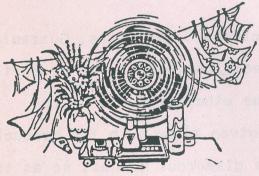
Sales Literature has not been discussed in this report.

A few examples showing the typical problems seen in User Instruction Manuals are il]ustrated in the following pages.

## IMPORTANT DIRECTIONS FOR USE



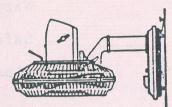
When you put-on the fan, start at full-speed first and after the fan gains full-speed, change-over to any of the desired speeds. This way you will save power and prevent unnecessary load on the motor.



neep other objects sufficiently away from the fan allowing an obstruction-free passage of Oscillation to the fan-head.



Do not make any adjustments in the fan OR carry the fan from one place to another while the ian is in operation to avoid damage OR injury.



Do not use the fen horizontally as such use will damage the bearings of the motor.



It is dangerous to use the fan while manipulating excess inclination as the stability of the fan will be lost and the fan may fall down during operation resulting in damage or injury.

SAMIRA TABLE-FAN

#### EXAMPLE 1

### A TABLE FAN (SAMIRA)

#### TYPICAL PROBLEMS

- Do's and Dont's are mixed up with the use
- o instructions.
- Visuals do not convey the proper message.
- Do's and Dont's are not given enough importance.

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#### INSTRUCTIONS FOR USE

#### PRELIMINARY

Make sure that the Cabinet is perfectly clean and wash the shelves and freezer (evaporator).

Any dirt-marks should be carefully removed with a cloth moistened in soap and water.

NO OTHER CLEANING LIQUID SHOULD BE USED FOR THIS PURPOSE: Before putting the Refrigerator into normal use, it is advisable to leave the cabinet door open for 24 hours with the current switched off.

This allows for any odour of packing or newness to disperse before food is stored in this space.

#### **OPERATIONS**

Switch on the current and turn the temperature control to a suitable setting. In tropical climates a cabinet temperature below 8° C is usually satisfactory.

The temperature control dial has eight settings from 1 (Warmest) to 8 (coldest) plus Defrost and Off. Initially set the dial at 4. After using the refrigerator, adjust dial to a setting that is best suited to your need.

When switching from No. 1 to a higher number, the control knob should be turned in the direction of the arrow marked on it, and when switching from No. 8 to a lower number, the control knob must be turned in the reverse direction. If the knob is at the 'OFF' position, it must be turned only in the direction of the arrow.

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Tins should only be placed in the cabinet to chill for about one hour, i.e. when serving tinned meat to set the jelfy.

BANANAS, PEACHES, MUSHROOMS AND MELONS SHOULD NOT BE STORED IN A REFRIGERATOR.

## GODREJ REFRIGERATOR

#### EXAMPLE 2

A REFRIGERATOR (GODREJ)

#### TYPICAL PROBLEMS

- Do's and Dont's are not seperately classified
- O but are mixed up with operation instructions.
- No visuals to support the text.

Similarly other product manuals were also analysed and the typical problems in each of them were noted. From this, a list of typical problems seen in User Instruction Manuals was made.

- TYPICAL PROBLEMS IN USER INSTRUCTION MANUALS
- Proper importance is not given to user instructions.
- They are not properly classified.
- Visuals are not given to support the text.
- Visuals, if given, do not have required
- o relationship with the text.
- Visuals, if given, are not self-communicative.

### 3.4 USE SUGGESTIONS

This category of product instruction manuals gives additional information to the users of the product.

This information varies from product to product, but can be generally classified into following types.

- Recipes in case of Kitchen Appliances
- Knitting Designs in case of Knitting Machines
- Fabric Ironing Charts in case of Steam Irons
- Models likes house, cars, boats etc. in case of
- toys like Lego, Maxhina.
- Beauty Aids like make-ups, hair-styles etc. in case
- o of Beauticians equipments.

This part also being very specific has not been dealt with in this report.

#### 3.5 SERVICE BULLETINS

These are specially made manuals. They are meant only for selected personnel eg. service people. It gives detailed information about each and every part of the product, its code name, etc.

For example, A Sunbeam Electric Company's

Service bulletin for its flat iron models

shows all the parts used in the product, their

code numbers, the number of each part used etc.

Again, these manuals have not been dealt with being very specific in nature.

4 RECOMMENDED GUIDELINES FOR THE PRODUCT INSTRUCTION MANUALS.

### 4.1.1 INSTALLATION/ASSEMBLY MANUALS

- The text or visuals used for installation
- o instructions should be in the same sequence as
- o required for installation/assembly.
- The text should be clear and unambiguous.
- Use visuals wherever possible as it overcomes
- o the language barrier.
- The visuals should have a proper correlation
- O with the text.
- Visuals should be very clear and easy to
- o understand.
- The parts of the product should be clearly
- O identifiable/distinguishable in a visual.
- The parts should be properly numbered for an
- o easy reference with the text.
- Numbering of parts should be done sequentially.

- The arrows used for connecting part names with
- O the corresponding parts in a visual should be drawn
- O in an ordered manner.
- The arrows should create a visual simplicity on the
- O page.
- Parts information and part list should be properly
- o correlated.
- An additional flap, showing the product features,
- O can be given. This has an advantage of having a
- O continuous reference of product while going
- O throughout the manual.

# 4.1.2 SUGGESTED CONTENT STRUCTURE OF AN INSTALLATION/ ASSEMBLY MANUAL.

- Overall diagram/picture of the product identifying
- o the parts.
- Diagrammatic sequence of assembly procedure
- Brief text to explain the points which are difficult
- O to illustrate through diagrams.
- A list of precautions & do's and dont's.

#### 4.2.1 OPERATION INSTRUCTION MANUALS.

- The text or visuals used for operation
- O instructions should be in a logical sequence,
- O following the operational sequence.
- The text should be clear and unambiguous.
- Use of visuals should be done as much as possible
- O to overcome the language barrier.
- The visuals should have a proper correlation
- o with the text.
- Visuals should be very clear and easy to
- o understand.
- The parts of the product should be clearly
- O identifiable/distinguishable in a visual.
- There should be a proper differentiation between
- O the use instructions and the user instructions
- O like Warnings, Cautions, Notes, Do's & Dont's
- o etc.
- Instructions for cleaning and maintenance should
- O also be in a logical sequence.

- Instructions for care, cleaning and maintenance
- o of the product should also follow the same
- o points mentioned above for use instructions.
- 4.2.2 SUGGESTED CONTENT STRUCTURE OF AN OPERATION INSTRUCTION MANUAL.
  - Overall diagram/picture of the product identifying
  - o the parts.
  - Diagrammatic sequence of operation/use procedure.
  - Brief text to explain the points which are
  - O difficult to illustrate through diagrams.
  - A list of precautions & do's and dont's clearly
  - O distinguishable from the text for operation
  - o instructions.
  - The same structure mentioned above is valid
  - O for cleaning and maintenance instructions.

#### 4.3.1 USER INSTRUCTION MANUALS

- The text of user instructions should be given
- o proper importance.
- These instructions should be seperately classified.
- The title should be made bold.
- The title should be very specific like Warning,
- O Caution, Note etc.
- User instructions like Special Tips, Points to
- O Remember, Important Safeguards, Do's and Dont's,
- O etc. should be seperately mentioned. These can be
- O made bold either by use of a different colour or
- O by enclosing the text in a rectangle.
- User Instructions like Notes, Cautions, Warnings
- O etc, if combined with the text of Use Instructions,
- O should be made more prominent. This can be
- O achieved by many ways like use of a different colour,
- O use of capitals, use of brackets, etc.

- 4.3.2 SUGGESTED CONTENT STRUCTURE FOR USER INSTRUCTION MANUALS.
  - Bold and specific title.
  - Clearly distinguishable User Instructions
  - o like Warnings, Cautions, Notes, etc. from
  - O Use Instructions in case of a combined text.
  - Seperately classified User Instructions like
  - O Points to Remember, Special Tips, Important
  - O Safeguards etc.

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