

Procedure for Creating Effective User Manuals

Step-by-step plan and checklist for developing a high-quality manual:

Step 1 – Identify the Target Audience

- Ensure that the manual matches the needs and preferences of the user group.

Step 2 – Conduct a Conformity Assessment

- Determine which manual-related requirements are included in the relevant standards, directives, and/or regulations.

Step 3 – Collect Product Information

- Gather all necessary and relevant information by consulting subject-matter experts.

Step 4 – Define the Document Structure

Ensure that the user:

- can quickly find the required information.
- does not overlook important warnings and safety instructions.

Step 5 – Write Clear and Instructional Texts

- Keep it concise: avoid unnecessary information and get straight to the point.
- Make the manual user-friendly: use clear steps, short sentences, and a logical structure.
- Ensure good navigation so users can quickly find what they need: include a clear table of contents and clear headings.

Step 6 – Create Illustrations

Illustrations not only make instructions clearer, but can also replace text.

Step 7 – Translate and Localise

- Determine whether translation is legally required.
- Choose a reliable translation agency.

Step 8 – Define Layout and Style

- Ensure a clear and consistent layout, so the user can quickly find the required information.
- Use numbered lists (1, 2, 3) for step-by-step instructions and bullet points for lists of features or options.
- Make safety information clearly recognisable by using colour and symbols, so that warnings stand out immediately.
- Provide sufficient white space between text blocks and images to improve readability and create a structured appearance.

Step 9 – Compile the Content

After compiling, check:

- the visual elements (are images and tables correctly positioned, sharp, and clearly legible, etc.)
- references and cross-references (is the table of contents correct, are warnings accurate, do internal links function properly, etc.)

Step 10 – Publish and Distribute the Manual

If you provide your manual digitally, check that:

- the content is clearly readable on different screen sizes.
- interactive elements, such as hyperlinks, function properly.

Single source software is a tool that enables both printed and digital versions of content to be generated from a single source. Manualise also offers this software under licence.

Need more help?

We are happy to help.

+31 (0)15 800 02 99 / www.manualise.com/en/

Manualise