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Research article

Explicit and Implicit Components of Social and Technical Instruction

Irina G. Belyaeva (✉) 

D&B Dienstleistung und Bildung, Leunaer Str.7, 12681 Berlin, Germany

irina.beliaeva@dub-berlin.de

Abstract

Instructions are increasingly part of our lives and become the subject of research by linguists, philosophers, political scientists, sociologists, and marketing professionals. Instructions not only regulate social aspects of our life, but also allow us to control technical systems and devices. Analysis of the explicit and implicit components of instructions provides knowledge about the types and functions of instructions, their direct and indirect impact on individuals and the human community at large. The paper takes a close look at “job descriptions” and “user manuals,” of instructions as algorithms for actions. It explores the discrepancy between the centrality of instruction for social life and the comparatively recent appearance of the term „instruction“ in our vocabulary. In linguistic terms, the paper refers to the Russian uses of „instruction“ but its conclusions apply more universally.

Keywords: Instruction; Text type; Functional style; Implicitness; Explicitness

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Научная статья

Явные и неявные компоненты социальной и технической инструкции

Ирина Георгиевна Беляева (✉) 

D&B Dienstleistung und Bildung, Лойнер.7, 12681 Берлин, Германия

irina.believa@dub-berlin.de

Аннотация

Инструкции все чаще входят в нашу жизнь и становятся предметом исследований лингвистов, философов, политологов, социологов и маркетологов. Инструкции не только регулируют социальные аспекты нашей жизни, но и позволяют нам контролировать технические системы и средства. Анализ инструкций с точки зрения явных и неявных компонентов расширяет наши знания о типах и функциях инструкций, их прямом и косвенном воздействии на человеческое сообщество и каждого отдельного человека в отдельности. В статье подробно рассматриваются “должностные инструкции” и “руководства пользователя”, инструкции как алгоритм действий. Исследуется несоответствие между центральной ролью обучения в общественной жизни и сравнительно недавним появлением термина “инструкция” в нашем лексиконе. С лингвистической точки зрения статья относится к использованию слова “инструкция” в русском языке, но имеющиеся выводы универсальны.

Ключевые слова: Инструкция; Тип текста; Функциональный стиль; Имплицитность; Эксплицитность

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INTRODUCTION

In Russian, the word “instruction”, as noted in Fasmer's (1950) Dictionary, appeared under Peter I, denoting instruction, guidance, directive, prescription, instruction, installation. Now “instruction” is included as a term in many industry dictionaries: the legal dictionary (Dodonov, 2001); Terminological Dictionary for Construction in 12 Languages (Russian, Bulgarian, Hungarian, Spanish, Mongolian, German, Polish, Romanian, Serbo-Croatian, Czech, English, French) (Eingorn, et al., 2016); Terminological Dictionary for Concrete and Reinforced Concrete (Mihajlov et al., 2007), Brief Dictionary of Used Terms in Informatics and Modern Computer Technologies (Kratkij slovar' upotrebyaemyh terminov, 2020). But, regardless of the industry, an instruction means an algorithm for an action.

The lexeme “instruction” contains many more frames than can be seen in dictionaries. This is due to the fact that the phenomenon itself, which received the name “instruction”, existed long before its first official vestment in a lexical unit. It would be correct to say that instructions as a phenomenon have existed for as long as humanity has existed. The instructions were originally implicit. They were present in gesture and oral speech as one of the main ways of transferring experience. It can be assumed that the instructions in implicit form appeared with the advent of human speech. Human speech was formed in the process of evolution rather slowly and went through various stages in its development. Most likely, the first forms of instructions began to build during the formation of sign speech. Communication via sound speech contributed to the development of the transfer of experience in various types of oral texts. Many of them had a hidden subtext of the algorithm of behavior or action, which is the main characteristic of the instruction. Texts with an implicitly instructive character which appeared even before the term “instruction”, include:

- proverbs ("Don't put all your eggs in one basket.");
- folk signs (cut your hair when the moon is waxing and you will have good luck / if you marry in Lent, you will live to repent /if a girl catches the bride's bouquet after a wedding, she will be next to marry);
- cooking recipes: 2nd to 3rd millennium BC (Bottéro, 2004)
- medical recipes of Ancient Egypt (Pommerening, 2006).

An example of one of the oldest instructions is the ancient Egyptian erotic papyrus of Turin (Shokeir & Hussein, 2004). The experience described in fables (Gesiod, 1999), or fairy tales such as Little Red Riding Hood created a model of behavior, recommendations on how to act in a given situation. Any manual also contained instructions on how to independently acquire new knowledge, to complete tasks, and to use the rules in practice.

Since the 18th century in Russia, such a phenomenon as an instruction has taken on a form enshrined in linguistic signs. From this point on, we can talk about the explicitness of the instructions. If initially these were job descriptions (Instrukciya



polkovnich'ya, 1826), then with the development of technology appeared instructions for the operation of technical devices.

The development of tools and technological progress have significantly changed the way of preserving and distributing instructions. If earlier they were saved on clay tablets, then on paper, now the instructions are recorded on audio, video tapes, and electronic media.

In the course of history, instructions were transformed, their content and way of expression expanded. But, despite this, in terms of Solomonik's (2010) classification of sign systems, the means of expressing instructions have not changed since the appearance of writing. Instructions can be expressed by six types of sign systems that were distinguished by Solomonik: a system of natural signs, a figurative system, a language system, a recording system, formalized systems with constant signs, formalized systems with variable signs (Solomonik, 2010).

The instruction can be represented by a system of natural signs expressed by signs of natural passage, for example when a person is guided by the terrain. If you get lost in the forest, then using natural signs as instructions (ants build anthills south of the trees, moss grows on the north side, etc.), as well as the ability to interpret these signs, you can find your way in the right direction. Instructions can also be represented by figurative systems, the basic sign of which is icons. The images on the Turin erotic papyrus are iconic instructions. Most often, instructions are recorded using a language system (expressed in words) or a recording system (expressed in hieroglyphs). The multiplication table can be attributed to an instruction consisting of a formalized system with constant signs. And, for example, the formula of the combination law for ordinary fractions

$$\left(\frac{p}{q} + \frac{r}{s}\right) + \frac{m}{n} = \frac{p}{q} + \left(\frac{r}{s} + \frac{m}{n}\right)$$

is an algorithm for their addition. In contrast to the multiplication table, the instruction for working with fractions is presented using a formalized system with variable signs, the base signs of which are variable symbols.

Thus, though modern instructions refer to different genres, they are expressed by the known types of sign systems and implemented both explicitly and implicitly in discourses and texts.

BACKGROUND

A broad understanding of the term “instruction” finds its confirmation in the works of linguists who study this type of text. According to Igor Borisovich Lobanov (2003), most of the texts that surround us are instructions or are instructive in nature. In some works, instructions are called the supra-genre text (Horohordina, 2013, p. 11).



In the modern sense, instructions go far beyond the official style. These instructions include laws, guidelines, regulations, recommendations, rules, directives, arrangements, enactments, decrees, orders, requests, advice, recipes, plans of action, schemes of actions, order of actions, homilies, testamentary burdens, exhortations, edifications, commandments, covenants, fables, parables (Horohordina, 2013, p. 8); job descriptions, public instructional texts (checklists; instructions governing the rules of public conduct, behavioral rules in emergency situations); instructions for consumers (instructions for medicines, food products, instructions for using industrial goods, manuals for the operation of technical equipment) (Rekhtin, 2005, p. 4). Lobanov (2003) introduces the concept of instructional, combining user, departmental, and job descriptions, recipes, tips, training and practical manuals describing how to perform certain operations (p. 3). And the “instruction” and the “guidance” are recognized as synonymous terms (Trebovaniya tekhnicheskogo reglamenta, n.d.).

RESEARCH RESULT

The Concept of Instruction

The author of *Principles of Constructing an Instructional Text in Russian* (Lobanov, 2003, p. 3) uses the general term „instructional text“ to refer to the texts of this type and to the actual instructions – definitions of departmental duties as well as job descriptions. Departmental instructions and job descriptions often contain the word “instruction” in their names. The relation of such documents to the type of text “instruction (i.e. description)” is expressed explicitly. Many texts that regulate a certain order of action do not contain lexical units that allow them to be explicitly referred to as “instruction.” Proverbs, for example, provide instructions only implicitly (“An apple a day keeps the doctor away”). Their belonging to instructional texts is determined not so much by the plan of expression (the presence of lexical units inherent in the texts of instructions) as by the plan of the content (the text is organized in such a way that it performs the functions of an instructing text without a direct reference to the “instruction” text type). Such instructions are implicit. Thus, all instructions can be divided into explicit and implicit.

Moreover, it is necessary to distinguish between the concepts of departmental instructions and job descriptions, noting that, according to the Great Legal Dictionary (Dodonov, 2008), a departmental instruction is a subtype of a departmental regulatory legal act. In addition to job descriptions, there are production instructions. The concept of “job description” is typical for determining the content of the performed labor function of an employee filling a certain position. The production instruction has many interpretations, but it can be concluded that this is “a certain algorithm for the actions of an employee with certain equipment.” (Ivanova, 2021)

Thus, it is possible to distinguish job descriptions and production instructions for the employee to fulfill his or her employment duties. The term “employment duties” is



fixed in the Labor Code of the Russian Federation (The State Duma, 2022). In this case, the concept of “employment duties” is a relative concept. The rights of some workers may be the employment duties of other workers. For example, the right of an employee to timely payment of wages becomes the employment duty of accounting employees. Thus, the prescribed labor rights of some employees in the legislation become the job descriptions of other employees. The occupational standard—as “a characteristic of the competence levels required by an employee to carry out a certain type of professional activity” (Professional Standards, n.d.) – is an implicit instruction for the personnel department or recruitment agencies.

In the work of Moshchanskaya and Kinderknekht (2013), the term “user manual” has appeared (p. 135). Based on the provisions of the Law of the Russian Federation dated February 7, 1992, No. 2300-I On Protection of Consumer Rights, a consumer is “a citizen who intends to order or to purchase, or who orders, purchases, or uses goods (works, services) exclusively for personal, family, household, and other needs not related to the implementation of entrepreneurial activity.” (Government of the Russian Federation, 1992). Based on this definition, the purchase of a product by a consumer does not always mean its use. And the instructions are primarily intended for those who directly use goods (works, services). So, the Civil Code of the Russian Federation contains the concepts of “instructions for use” (Art. 628), “operational manual” (cl. 2, Art. 691) (The State Duma, 2012). It should also be noted that there are no such concepts as “consumer instruction,” “instruction on consumption” in the Civil Code of the Russian Federation. Therefore, in Russian, when choosing between “consumer instruction” and “user instructions,” it is more expedient to adhere to the terms “instructions for use” or “operational manual.”

A literature review shows that instructions as a type of text are present in many styles. First of all, instructions are associated with an official style (Yashina & Nikiforova, 2018, p. 98). Based on the classification of styles by Elena Eduardovna Gribanskaia (2017), we can say that instructions as a type of text are present in colloquial, scientific, official, journalistic, and artistic styles (pp. 123-127).

Initially, instructions have appeared in a colloquial style as a means of transferring experience, upbringing, or teaching in the form of orders, requests, advice, a plan of action, homilies, testamentary burdens, exhortations, edifications, commandments, covenants, fables, parables, fairy tales. They can be both implicit and explicit. In the artistic style, instructions are present, for example, in fables, fairy tales, stories, short novels and they are always implicit. Scientific-style instructions can describe the order of experiments, research tasks and be expressed both implicitly and explicitly. The largest number of explicit instructions contains an official style: instructions for goods, departmental instructions and job descriptions, public instructional texts (checklists; instructions governing the rules of public conduct, behavioral rules in emergency situations); guidelines, regulations, instructions, rules, directives, arrangements, enactments, decrees, orders, consumer instructions. A journalistic style contains exclusively implicit instructions: reports, interviews, conversations, articles, reviews, feuilletons.

Table 1 shows the correspondence of instructions to styles:



Table 1. Correlation of the “instruction” text type with functional styles.

Functional styles	Type of instructions	
	explicit	implicit
colloquial	+	+
scientific	+	+
official	+	+
artistic		+
journalistic		+

The Table shows that instructional text appears in each of the functional styles. Explicit and implicit instructions are contained in colloquial, scientific, and official styles. Highly implicit instructions are contained in artistic and journalistic styles.

Before the development of computers and computer systems, the user of instructions was exclusively human. But according to Alexander Petrikovskij, a program that works, on the basis of a task algorithm, created by a person, that is, according to his/her instructions, might be called subject-oriented (Petrikovskij, 2006). Usually, the activity of technical instruction is aimed at the object and the object changes under the influence of the subject. Here it would appear that the program that affects the object and changes the ego becomes the subject.

Instructions can be defined as explicitly and implicitly regulatory texts for users, workers performing their employment duties, individuals and programs. In other words, instructions are texts that implicitly and explicitly regulate the activities of subjects. The terms of “individual” in this paper is chosen based on its definition in the Psychological Dictionary, which is understood as a separate representative of the human community, a social being that goes beyond its biological limitations, using tools (Karpenko et al., 1998).

Functions of instructions

Instructions are one of the means of knowing the world. They record the experience of previous generations, allowing descendants to move forward in the study of the surrounding reality, to avoid mistakes that are harmful to life and health.

Instructions can be tied to a specific object of reality, but often they set out an algorithm of action for a group of similar objects or phenomena. Thus, instructions systematize an experience, classify knowledge. The restrictive function of instructions, on the one hand, warns people against mistakes; on the other hand, it is often the deviation from the instruction that becomes the engine of progress, it is due to the deviation from the instructions that discoveries are made. Their restrictive function prescribes certain behavior for us. Largely due to instructions, society functions



smoothly. The presence of action algorithms optimizes our life, creates calmness and confidence.

This calls for the reflection of a problematic tendency. Gradually, the habit of searching for an algorithm is developed before embarking on a particular type of activity. The algorithms acquaints us with the accumulated both theoretical and practical experience, allowing us to synthesize new knowledge on its basis. But often the habit of acting, according to a template, its unconscious automated use leads to a decrease in the criticality of thinking, a lack of the skill to act independently and to make decisions, to develop instructions independently. A person in a finished form accepts a model of the world, established values. Society begins to divide into the creators of algorithms and their users, that is, a significant part of society begins to see the world through the prism of a certain circle of people. Instructions are a fairly simple and effective way to manipulate people's minds. Therefore, an important role is played by the moral and ethical appearance of the compilers of the instructions, their political views, life principles and beliefs. Instructions can be drawn up both for the benefit of people, protecting their rights and freedoms, and, for example, by totalitarian regimes, becoming a significant obstacle to the full life of each member of society, its personal growth, the preservation of its rights and freedoms, they can be a serious obstacle to the development of the individual.

Before the development of information technology, instructions were created by a person for a person. In the modern world, the instruction has become an integral part of computer programs and their sequential execution ensures the functioning of the entire technical system. Here, instructions are created by humans for their implementation by machines. If earlier instructions were read by people and the result depended on the accuracy of their execution by each individual, then the reading of instructions by machines ensures their absolutely accurate and identical execution by different automated systems. The instructions that form the basis of the program increase productivity and quality of work in those industries where accuracy of adherence to instructions is required. These areas include, for example, pharmacology, the production of technical devices. But humanity is not limited to the creation of automated systems that facilitate hard physical labor. Robots are starting to appear in areas that are related to creative ones. Currently, generators of ideas, poems, plots for books are popular.¹ They carry out a specific program based on human-generated instructions. A person can create several types of instructions for several computer systems. The result of creativity of each of the computer systems will be limited by the instructions contained in its program. Can such programs compete with the creative flight of thought of a gifted person? Most likely, it's hardly. They mimic the creative process by helping non-creative individuals get things done that involve solving creative problems. Often such programs are used by lecturers to create a large number of assignments and exercises.

¹ <https://novoseloff.tv/generator/>
<https://www.poem-generator.org.uk/>
<https://www.poem-generator.org.uk/didactic-cinquain/>
<https://randomall.ru/appearance>
https://randomall.ru/country_description



Also, ideas suggested by a computer can lead a person to interesting ideas. In this case, the programs do not pose any danger to a person, but only facilitate and optimize his/her work. Currently, various training programs have begun to be actively used, which train individual skills well, in the field of education. Furthermore, robots are being developed to appear in kindergartens, schools, and universities, replacing lecturers (Polishuk & Verner, 2018, Serholt et al., 2017; Velentza et al., 2021). Teaching a certain subject, communicating with students, explaining new material, and exercising control over what has been learned, such robotic lecturers will likely follow certain instructions, which might lead to a template in teaching, namely, to standardization of knowledge. Were we to actually use robotic lecturers in all educational institutions, the quality of education might, on the one hand, be the same in all schools, but, on the other hand, students would only acquire a certain set of knowledge. There might then arise the danger of knowledge that is transmitted through the prism of a certain group of people who have drawn up instructions for the educational process software.

Traditionally, instructions were drawn up in order to indicate an algorithm of actions for using an inanimate object or an algorithm of actions aimed at achieving a certain result or goal (a job description, instructions for breeding chickens). Now the question arose about the advisability of drawing up instructions for oneself. Drawing up such instructions allows persons to know themselves better, to understand themselves. As the authors of countless unscientific self-help sources will insist, such instructions to oneself will also help to avoid conflicts and improve communication with others.² These ideas further testify to an expanding culture of instruction in which we seek to control ourselves and others.

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²for example, *Instructions for Using Yourself* https://zen.yandex.ru/media/prazdnik_k_nam_prihodit/instrukciya-po-primeneniiu-sebia-chast-1-5e46ab3e7358840beff9648a and *Personal instructions for you: Human mechanics* <http://reiki-newlife.com/blog/personalnaya-instrukciya-k-sebe-mexanika-cheloveka/>



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СВЕДЕНИЯ ОБ АВТОРЕ / INFORMATION ABOUT THE AUTHOR

Ирина Георгиевна Беляева,
irina.believa@dub-berlin.de,
ORCID 0000-0002-7083-3564

Irina G. Belyaeva,
irina.believa@dub-berlin.de,
ORCID 0000-0002-7083-3564

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