User Guide Template

Month 20YY

Version X.XX

Company Information

Copyright and third-party information as required

Document Revisions

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| --- | --- | --- |
| Date | Version Number | Document Changes |
| 05/02/20xx | 0.1 | Initial Draft |
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# Introduction

## Scope and Purpose

[Introduce the product and its purpose, highlighting key features and benefits]

[Introduce the purpose of the user guide, what functionality or workflows will be covered? Are there any assumptions about the users’ knowledge or experience, or prerequisites? ]

## Process Overview

[Provide a concise description of the overall processes managed by the software, and how the user interacts with the system. As applicable, reference related processes and corresponding documentation (you may want to create an ordered list of each workflow/process to be covered).]

[typical sequence for using the software to manage {group of workflows/functions}:

1. Configure your workspace
2. Manage a key workflow
3. Manage another key workflow
4. Report
5. Troubleshoot]

[You may choose to include a process flow diagram to accompany the text. Consider including subprocess diagrams throughout the guide to introduce new or subsequent workflows]

# [Process/WorkFlow 1]

[Provide a concise description of the context for this process or workflow, including any requirements or conditions that are relevant. Repeat this entire section for each major workflow or process.]

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## [Sub-Process or Workflow Step 1] Example: Configure Connect to manage your work

[Provide a concise description of the context for this sub-process or workflow, including any requirements or conditions that are relevant.]

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### [Procedures for Step 1] Example: To Log in to Connect:

1. Do something.
2. Complete an action.
3. Select a value.

Screen capture

1. Enter some text.
2. Drag and drop a value.
3. Click or press something to complete the procedure.

[NOTES, CAUTIONS, and WARNINGS provide any relevant or supplemental information about consequences of performing a step incorrectly. Place warnings before the step to be taken. Notes may be placed either before or after the corresponding step.]

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### [Procedures for Step 2]:

1. Do something fairly complex that needs substeps:
2. Do the first thing
3. When something happens, do the next thing.
4. Click a button or a link.
5. Enter some data.
6. Complete the action.
7. Complete an action using one of the following options:

* Option 1

1. Click somewhere.
2. Enter something.

* Option 2

1. Click somewhere.
2. Enter something.
3. Select a value.

Screen capture

1. Enter some text.
2. Click or press something to complete the procedure.

## [Sub-Process or Workflow Step 2] Example: Asset Record Statuses

[If a sub-process or workflow step requires additional context and detailed information to properly prepare the user, you can expand a context section to include tables (such as definitions of the values available in a dropdown) or graphics such as flow diagrams. You should add captions to identify tables and graphics, and consider including a table of figures following the TOC if the number of graphics and tables is significant.]

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| --- | --- |
| Indicator | Definition |
| **Value 1** | Lorem ipsum dolor sit amet, consectetur adipiscing elit. |
| **Value 2** | Sed id neque auctor, pellentesque quam vel, pulvinar lorem. |
| **Value 3** | Morbi in odio vitae dui dictum ultricies eu vel nisi.  Phasellus eu dui vitae nisl viverra vulputate ac sit amet turpis. |
| **Value 4** | Vivamus tristique augue ornare lorem lobortis, a pellentesque felis blandit. |
| **Value 5** | Duis at nisi eget ligula fermentum pretium at et felis.  Integer consectetur nibh a condimentum rhoncus. |

Figure X-X: Lorem ipsum dolor sit amet

If you encounter issues not addressed by this user guide, please contact your account manager for additional support.

# Appendices

[Appendices are optional, and are used to provide additional detailed information that may help the end user manage the overall application. Examples could include references to standards (such as W3C standards), technical specifications required for regulatory compliance, checklists, or other information of a technical nature.]

# Index

[Depending on the size or complexity of the final document, consider pulling together an index to assist the using in location specific information. Index entries correspond to tags or categories, and are useful in navigating long books.]

## Style Sheet Information

The following styles have been set up in this template. Avoid applying manual character formatting to the document. Applying these styles will assist in the conversion process if the document is to be laid out in a structured authoring tool, content management tool, or an HTML editor.

| Style Name | Apply to |
| --- | --- |
| Title | Title as listed on the cover page of the document |
| Subtitle | Subtitle as listed on the cover page of the document |
| Heading 1 | Chapter Name or Process or Workflow |
| Heading 2 | Subsection or SubProcess or Workflow step |
| Heading 3 | Subsection 2 or Procedure |
| Callout Block Copy Note | Notes, cautions or warnings, use arrow graphic on the left margin |
| Chapter Body Copy | Generic text following a heading |
| * Chapter Body Copy – Bullet | Unordered list within a section or subsection, sometimes within a Step to indicate alternative ways to do something. |
| * + Chapter Body Copy – Bullet 2 | A secondary unordered list, within a higher level ordered or unordered list |
| 1. Chapter Body Copy – Step | An ordered list (sequential) used in a procedure to indicate the order of actions to be taken |
| 1. Chapter Body Copy – Step a | A secondary ordered list, e.g. substeps in a procedure |
| Chapter Body Copy – Indent | Sets additional text inward so that it aligns with either Chapter Body Copy – Bullet or Chapter Body Copy – Step |
| Chart Body Copy | Text within a table |
| Chart Header Information | The first row of a table. |
| Caption | Descriptive text for a table or graphic. |
| Header | Text that appears at the top of each page. |
| Footer | Text that appears at the bottom of each page. |
| Chart Title and Footer Info | Copyright and other front matter preceding the Table of Contents; additional information used to footnote or provide a legend for a table. |
| TOC Heading | Heading used for Table of Contents, Table of Figures (if applicable), and the Document Revisions pages of the front matter to the document. |
| TOC 1 | TOC display information for a chapter. Generated automatically from Heading 1. |
| TOC 2 | TOC display information for a sub-section. Generated automatically from Heading 2. |
| TOC 3 | TOC display information for a subsection 2. Generated automatically from Heading 3. |
| [Template Instructions] | Guidance on building out the user guide. Should be deleted prior to publishing. |