Your Company Name

Software User Guide

Date

Revision History

Date	Version	Author	Change

Table of Contents

Note: Text displayed in blue italics is included to provide guidance to the author and should be deleted before publishing the document. In any table, select and delete any blue line text; then click Home→Styles and select "Table Text" to restore the cells to the default value.

1 Introduction

This document is a user guide (training or reference), which provides information for using the <Name of System, Application, or Process>.

1.1 Purpose and Scope

Provide information about the purpose and scope of this user guide. Include background information that could indicate why it is needed.

1.2 Background

Provide background information about the system, application, or process.

1.3 Audience

Provide information about who the intended audience for this document is.

1.4 Referenced Documentation

Provide information about all documentation referenced in this document, e.g., number, title, version, and date.

Document Number	Version	Date	Document Name

2 What is the (Application, System, or Process)

Provide a description of the application, system, or process this user guide is for.

2.1 Major Components, Functions, and Features

Provide a description of the major components, functions, and features of the application, system, or process.

2.2 Benefits

Provide a description of the benefits of the application, system, or process.

2.3 Users

Provide a description of the users for the application, system, or process.

2.4 Authorization Profiles

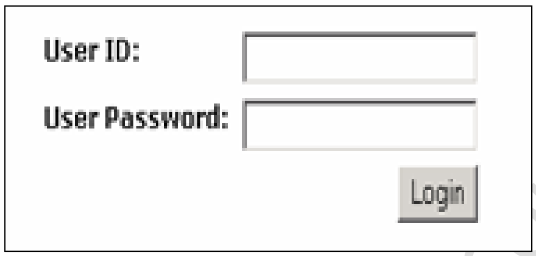
Provide a summary of the functional authorizations in the application, system, or process, e.g.,

Role	Function	Data	Capabilities (CRUD)
Administrator	*Maintenance of User Profiles:* • *Adding new users and assigning what the new user can access* • *Modifying user profiles* • *Deleting users* • *Complete access to all areas of the application.*	*User Maintenance*	*Create (C)* *Review (R)* *Update (U)* *Delete (D)*
Management	• *Registers by completing Profile* • *Completes Decision Matrix* • *Updates existing proposals* • *Maintains Responsibility Matrix* • *Assigns proposal sections* • *Access to all reports and views* • *Updates capability for all tabs.*	*Opportunities*	*Create (C)* *Review (R)* *Update (U)*
Customer Team	• *Registers by completing Profile* • *Updates proposal status* • *Access to all reports and views* • *Updates capability tabs only. All other tabs are read-only.*	*Opportunities*	*Create (C)* *Review (R)* *Update (U)*

3 Access Information

3.1 General Information A User Should Know Before Getting Started

Provide information about how to login into the application, system, or process, e.g.,

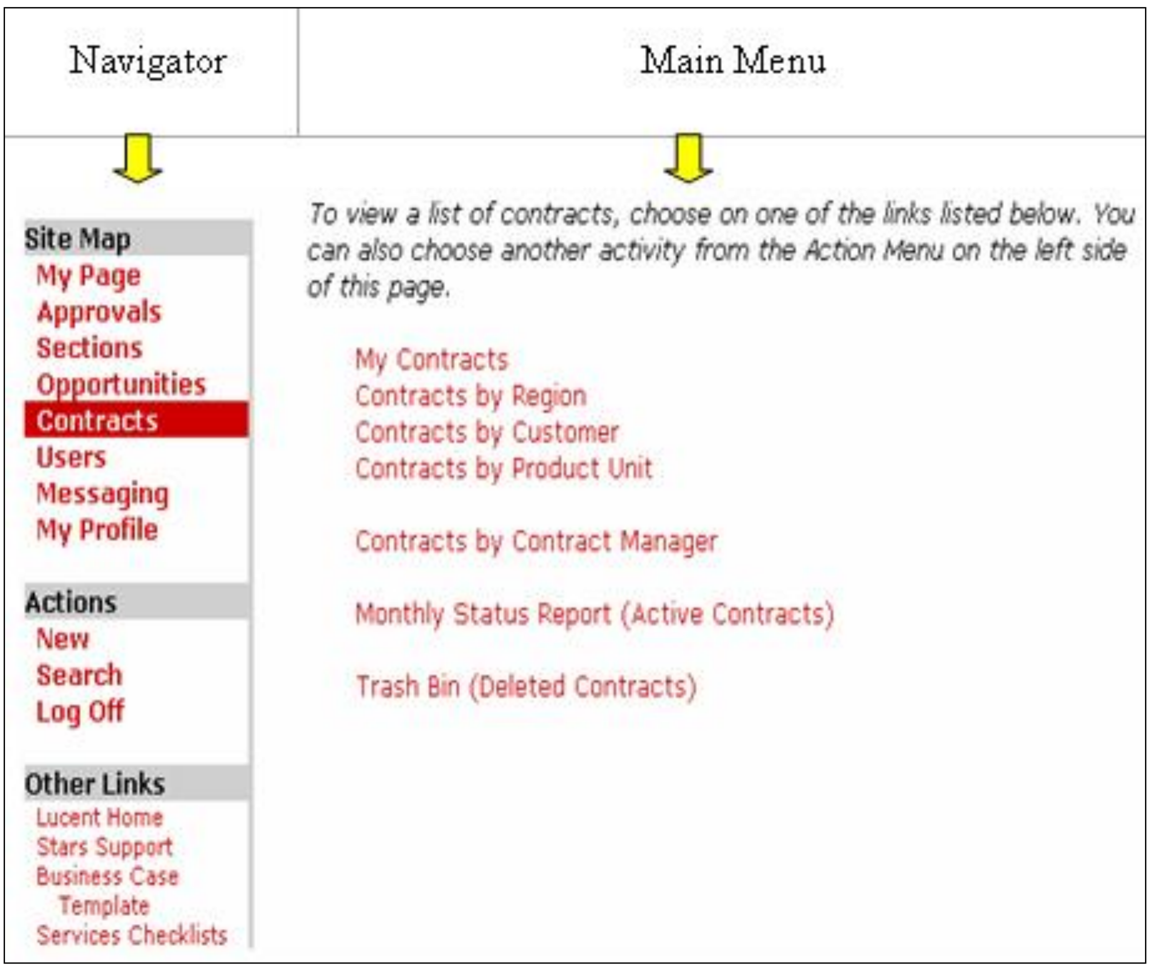


- ***Login with your User ID and password. The System will navigate to the home page, with a navigation menu on the left and a blank form on the right.***
- ***Once you are registered into the application, system or process, your ID will be your username and your current password will be your password. There is no need to change this, changing it may cause difficulty later on.***
- ***If you are not registered and require access, you must send a message to xyz@companyname.com (administrator) requesting use of the system.***
- ***At the time of registration, you will be affiliated with the customer team(s) you support. Once these customer teams are selected, the only information you will be able to access will be for the customer teams you support. The customer team drop down menus located throughout will only reflect the customer teams you support.***
- ***The System is case sensitive: Base Number XYZ-01-000123-A1 is not the same as xyz-01-0000123-a1 and will not enable you to access the document.***

4 Navigation

Provide information about how to navigate the application, system, or process, e.g.,

Depending on your role, the system will make options available. From the Home Page, there will be Main Menu information in the center of the window and a Navigator Menu with 3 major segments (i.e., Site Map, Actions, and Other Links) located on the left side of your window. As you travel through the system, the Navigator will appear on the left to allow quick and easy selection.



4.1 Navigating Menus

Provide information on how to navigate each menu starting with the main menu, e.g.,

The following table provides a summary of the Navigation Menu and its main segments, i.e., Site Map, Actions, and Other Links.

Menu Location	Description
Navigating	*The Navigation Menu is available along the left edge of the page. The Site Map lists the views available in the system, while Actions lists the options available within each view. For example, to search for a specific Opportunity, you would select Opportunities from the Site Map, and then Search from the Actions Menu.*
Site Map	*Site Map lists the different views available in the system.*
My Page	*My Page can be customized to reflect what you want to see when you click on My Page. Select My Page from the Site Map and select Customize from the Actions Menu and you will be given several choices of what can be reflected on this page. Click on Next in the dialog box and it will enable you to select the order in which you would like to view. You can select from one to all of the choices.* *You can also perform the following from selections on the Actions Menu:* • *Enter a new Quote (choose New Quote from the Actions Menu).* • *Enter a new Section (choose New Section from the Actions Menu).* • *Search existing Sections of a proposal by criteria you set (choose Sections Search on the Actions Menu and the system will bring up the Section Detail page that will enable you to search proposals using any of the criteria on that page).* • *Run a report on your Solutions (click on the Opportunity on the Site Map and it will bring you to the Opportunities site to select reports listed in main menu).*

Menu Location	Description
Sections	***Sections enables you to view / change / add sections of a proposal in several different formats:*** • ***View sections for which you are responsible (choose My Active Section Assignments or My Sections by Proposal hyperlinks on the Sections site).*** • ***Create and assign new sections to team members (click New on the Actions Menu).*** • ***View proposal sections you assigned to team members (choose the Sections Assigned by Me hyperlink on the Main Menu).*** • ***Obtain reports from the Sections site (choose the Proposal Planning Report, Section Assignments, Active Proposal Listing, or Final Proposal Listing hyperlinks on the site). You will receive this information for the customer team selected on your profile.***

4.2 Navigate Main Summary

Provide summary information about the actions associated with the Site Map Menu, e.g.,

The following table lists a summary of Actions associated with the Site Map Menu. When you click on a Site Map Menu item, specific action items are displayed under the Action Segment. You can click on the Actions Menu item that is related to the respective Site Map Menu item to run the particular task, e.g., first click Opportunities on the Site Map, and then click New Solution on the Actions Menu.

Site Map Menu Location

Action	Opportunities	Sections	Contracts	My Page	My Profile
Change Owner			*Yes*		
Copy	*Yes*		*Yes*		
Customer Team					Yes
Delete		*Yes*	*Yes*		
Edit	*Yes*	*Yes*	*Yes*		Yes

4.3 Action Item Descriptions and Uses

Provide information about the action items and their uses, e.g.,

Each Navigator Site Map Menu Item has respective Action buttons associated with it that allow you to perform an action on a "Record". Options shown are related to your system user privileges, i.e., what you are permitted to see and perform, and the menu displayed on the screen.

Action	Description
Change Owner	*The Change Owner button is used to change the ownership of a contract.*
Customer Team	*The system is aligned along the Customer Team structure. Each Customer Team has a unique code.*
New (Section on a Proposal)	*The New button is used to create a new section on a proposal.*
New (Contract)	*The New button is used to create a new contract.*
New Solution (Opportunity)	*The New Solution button is used to create a new opportunity solution.*
Logout	*The Logout button is used to exit from the application. This feature will*

Action	Description
	always appear within the Navigator's Action Items to give you a convenient way to close the session at anytime. This will return the user to the Login Screen.

5 Major Procedures, Tasks, and Functions

Provide how to and step action information for the respective components, functions, procedures, tasks or features within the application, system, or process.

Repeat section as needed.

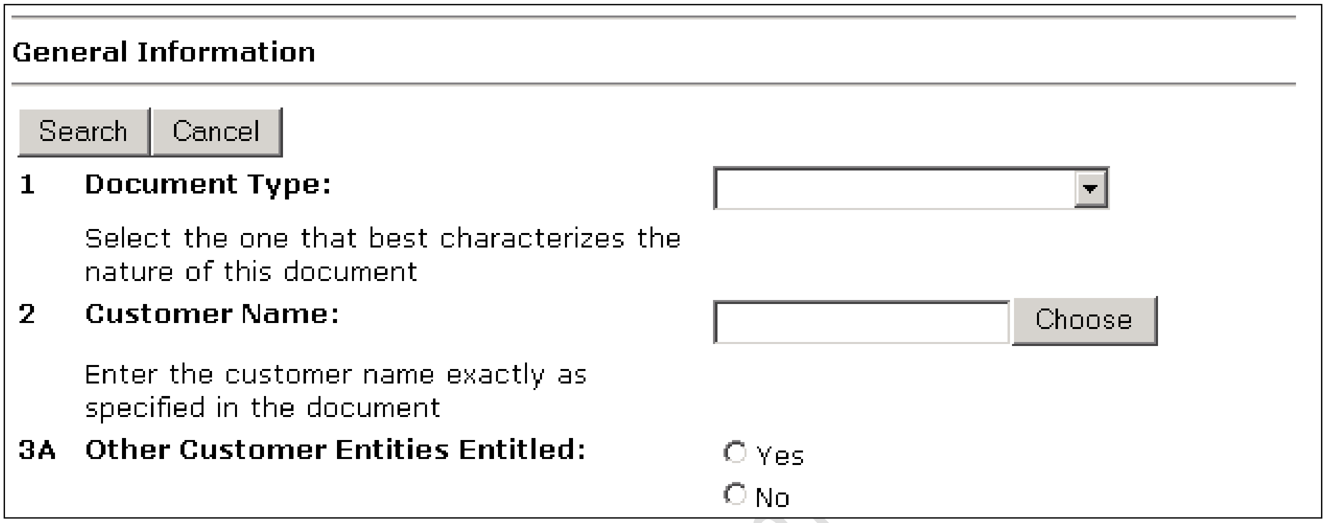
- ***Topic (component, function, procedure, task or feature name) indicate its name with a brief description..***
- ***Description. Provide a description of the action performed.***

Step #	Topic	Description of Action Performed

Note: Include graphics and process flows to help explain the topic or action. Put them in this section or place them in the Appendix Section when more space is required.

Sample graphics:

Initial questions for creating a new contract.



Sample menu to view a list of contracts

Sample deletion request:

6 Glossary

The following table includes a glossary of all the terms and abbreviations used in the user guide.

Topic	Description

7 APPENDIX

Include graphics and process flows in this section.