User Guide

Template

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**Document Lifetime**

[Company Name] may occasionally update online documentation between releases of the related software. Consequently, if this document was not downloaded recently, it may not contain the most up-to-date information. Please refer to www.[website].com for the most current information.

From the Web site, you may also download and refresh this document if it has been updated, as indicated by a change in this date: [Date].

**Where to get help**

[Company Name] support, product, and licensing information can be obtained as follows.

**Product** **information** — Documentation, release notes, software updates, and information about [Company Name] products, licensing, and service, are at [Company Name] website at:

http://www.[website].com

**Technical** **support** — Go to http://www.[website].com and select Support. On the Support page, you will see several options, including one for making a service request. Note that to open a service request, you must have a valid support agreement.

**Your comments**

Your suggestions will help us continue to improve the accuracy, organization, and overall quality of the user publications. Please send your opinion of this document to:

Documentation@[Company Name].com

If you have issues, comments, or questions about specific information or procedures, please include the title and, if available, the part number, the revision, the page numbers, and any other details that will help us locate the subject that you are addressing.

Preface

**Style Conventions**

The following style conventions are used in this document:

**Bold**

Names of commands, options, programs, processes, services, and utilities

Names of interface elements (such windows, dialog boxes, buttons, fields, and menus)

Interface elements the user selects, clicks, presses, or types

*Italic*

Publication titles referenced in text

Emphasis (for example a new term)

Variables

Courier

System output, such as an error message or script

URLs, complete paths, filenames, prompts, and syntax

*Courier italic*

Variables on command line

User input variables

< > Angle brackets enclose parameter or variable values supplied by the user

[ ] Square brackets enclose optional values

| Vertical bar indicates alternate selections - the bar means “or”

{ } Braces indicate content that you must specify (that is, x or y or z)

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# Introduction

## Purpose

State the purpose of the system, or software, that you are documenting. After describing the general nature of the system and software:

* Summarize the history of its development, operation, and maintenance
* Identify the project owner, client, users, and developers where necessary
* Identify current and planned operating sites / client implementations
* List relevant documents. Cross references to an appendix, if necessary

For example:

“The purpose of this document is to define the functionality that will be delivered by [Company] to [Company] for [Project]. This document serves as the sole reference for the scope of the system functionality to be delivered by [Company] to [Company]. Any change to the scope of the project or the Functional Specifications will require agreement via the change control process defined in the agreement between [Company] and [Company].

## Scope

Summarize the purpose and contents of this guide and describe any security or privacy considerations associated with its use.

## System Organization

Describe the system and the software to which this document applies, including, as applicable:

* Identification number(s)
* Title(s)
* Abbreviation(s)
* Version number(s)
* Release number(s)

# Describing the System

Describe the key features that relate to the system or software.

## Key Features

Provide a brief description of the intended uses of the software. This includes its capabilities, operating environments, and its benefits to end users.

[Enter text here]

## Inventory

Identify all files, including databases and data files, which must be installed for the software to operate.

Highlight security and privacy considerations for each file and identify the software necessary to continue or resume operation during an emergency.

[Enter text here]

## Environment

Identify the hardware, software, manual operations, and other resources required by the end user to install and run the software.

This may include:

* Equipment that is required to operate the system, for example, memory, storage, and peripheral equipment such as printers
* Communications equipment, such as modems and routers
* Operating systems, databases, data files, utilities, and other systems
* Other facilities, equipment, or resources that are required

[Enter text here]

## System Operations

Describe the organization and operation of the software/system from the user's point of view.

Include, as applicable:

* Performance characteristics and Relationship with interfacing systems
* Controls required (such as passwords) to manage the software
* Modes of Operations, for example, differences in what the user can do during an emergency or in different modes of operation
* Security and Privacy considerations associated with the software
* Troubleshooting to identify points of contact and procedures to be followed to obtain assistance and report problems.

[Enter text here]

# Installing, Starting and Stopping the System

## First-time Users

Describe the following, as appropriate:

* Procedures for turning the system on and off
* Understanding the user interface
* Keyboard layout and pointing devices

[Enter text here]

## Access Control

Describe the access and security features that are presented to the user.

* Include the following items, as applicable:
* How to obtain a password
* How to add, delete, or change passwords
* Security considerations relating to the storage of documents and other media that the user may generate, such as reports

[Enter text here]

## Installing the system

Describe the procedures that the user must perform so they can access/install software, configure software, delete data, and setup software operations.

[Enter text here]

## Starting the system

Provide step-by-step procedures for starting the system, including different startup options.

* Include a checklist for problem determination in case difficulties are encountered.

[Enter text here]

## Stopping and Suspending the system

Describe how to cease or interrupt use of the system and how to determine whether normal termination or cessation has occurred.

[Enter text here]

# Step by Step Instructions

Describe the instructions for using the software / system.

How you organize this chapter depends on the characteristics of the system / software that you are documenting. For example, you can choose to base the chapter on:

* How users work or the tasks they must perform
* How the menus work
* How the functions work
* Command Language instructions
* Describe detailed procedures in subparagraphs. The subparagraphs can be organized on a function-by-function, menu-by-menu, transaction-by-transaction, or other basis depending on the nature of the software.
* Include safety precautions, marked by WARNING or CAUTION, where applicable.

[Enter text here]

## Instructions

Explain how sections are organized, for example, by function, menu, or screen.

* Highlight if procedures must be performed in a specific order.

**Detailed Instructions**

Use the title of this paragraph to identify the function, menu, transaction, or other process being described. Describe menus, graphical icons, data entry fields, user inputs, outputs, error messages or alarms, and online help facilities.

[Enter text here]

## Conventions

Describe conventions used by the software, such as the use of colors, alarms, acronyms, and rules for assigning names or codes.

[Enter text here]

## Errors, Malfunctions, and Emergencies

Describe in detail the procedures to restart or recovery from malfunctions that occurred during processing. This is to ensure continuity of operations during emergencies.

[Enter text here]

## Messages

Provide details of all error, diagnostic, and information messages that may be presented to the users while using the software.

* Describe the meaning of each message and the action the user should take after each such message.

[Enter text here]

## Quick-Reference

If appropriate, provide a quick-reference card or page for using the software.

Summarize frequently-used function keys, control sequences, formats, commands, and other aspects of the system / software.

[Enter text here]

## Sample Table

[Enter text here]

|  |  |
| --- | --- |
| Term | Meaning |
| [Insert Term] | [Provide definition of the term used in this document.] |
| [Insert Term] | [Provide definition of the term used in this document.] |
| [Insert Term] | [Provide definition of the term used in this document.] |

# How to Use This Template

It is your responsibility to ensure that you understand this procedure before performing the following tasks. Contact the document author if you have any questions about this procedure.

## Add Your Logo to the Cover Page

To add your logo to the cover page:

* Go to the cover page and click on the Klariti logo.
* Press Delete. This removes the logo. The next step is to add your logo.
* Click Insert, Picture, and then From File.
* Find your image file and click Insert.

Tip: To adjust the size, layout, and position of the image, right-click on the image and select Format Picture.

## Add Your Logo to the Header

To add your logo to the header:

* Double-click on the Header area.
* Click Insert, Picture, and then From File.
* Find your image file and click Insert.

## Updating the Table of Contents

To update the table of contents:

* Right-click on the Table of Contents
* Select Update Field, click Update entire table and click OK.



## Adding Notes

Use notes to highlight pre-requisites, shortcuts, and other actions that should be highlighted to the user’s attention.

To add a text note, select the text you want to make into a note. Then, click **Note** from the styles drop-down menu.

**Note**: Insert your note here. Insert your note here. Insert your note here. Insert your note here. Insert your note here. Insert your note here. Insert your note here

## Adding Warnings

Use warnings to highlight actions that may have a serious impact on the system, for example, when purging data, or may compromise the user’s safety.

**Warning**: Highlight if damage to data, systems and/or individuals may occur if instructions are not followed carefully.

## Adding Comments

Use this style when adding comments, quotes or other such devices to the text.

Add comments, Add quotes. Add comments, Add quotes. Add comments, Add quotes. Add comments, Add quotes. Add comments, Add quotes. Add comments, Add quotes. Add comments, Add quotes.

## Adding Code Samples

Select your text and click Code from the styles menu.

Indent Number List: When a scheduled installation is missed. Indent Number List: When a scheduled installation is missed. Indent Number List: When a scheduled installation is missed. Indent Number List

# Appendix A: Acronyms, Abbreviations & Definitions

Provide details of terms, acronyms, and abbreviations required to properly interpret this document. This information may be provided by reference to the project’s Glossary

|  |  |
| --- | --- |
| Term | Meaning |
| [Insert Term] | [Provide definition of the term used in this document.] |
| [Insert Term] | [Provide definition of the term used in this document.] |
| [Insert Term] | [Provide definition of the term used in this document.] |

# Appendix B: Related Documentation

Identify all documentation referenced in this document by title, report number, date, and publishing organization. You can also cross-reference to another document if applicable

This section lists all documents referenced in the preparation of this document, such as a) specific directives affecting this project, b) previously developed documents relating to the project and c) documentation concerning related projects

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Document Title | Version # | Location | Author |
| 1 | Identify document | X.x | URL or Network path | Document Owner |
| 2 | Identify document | X.x | URL or Network path | Document Owner |
| 3 | Identify document | X.x | URL or Network path | Document Owner |
| 4 | Identify document | X.x | URL or Network path | Document Owner |
| 5 | Identify document | X.x | URL or Network path | Document Owner |

## Obtaining Documentation

The following sections provide sources for obtaining documentation from [Company].

### World Wide Web

You can access the most current [Company] documentation on the World Wide Web at the following site: http://www.yourwebsite.com

### Product Documentation CD-ROM

Technical documentation is available in a CD-ROM package that ships with your product. The Product Documentation CD-ROM is updated as required.

To order additional copies of the Product Documentation CD-ROM, contact your local sales representative or call customer service. The CD-ROM package is available as a single package or as an annual subscription.

You can also access [Company] documentation at http://www.yourwebsite.com.

### Ordering Documentation

[Company] documentation is available in the following ways:

Registered Customers can order documentation, including the Product CD-ROM from http://www.yourwebsite.com/

Nonregistered users can order documentation through a local account representative by calling [Company] corporate headquarters at [telephone number].

### Documentation Feedback

If you are reading [Company] product documentation on the Internet, you can submit technical comments on the support website.

You can e-mail your comments to [email address].

To submit your comments by mail, use the response card behind the front cover of your document, or write to the following address:

Attn: Publications Manager

Address 1

Address 2

Address 3

We appreciate your comments.