**United States Department of Agriculture**

Food and Nutrition Service



**FNS Office of Information Technology**

**Portfolio Management Division (PMD)**

**FNS Training Manual Template**

**for**

**[Project or System Name]**

**Version 1.1**

September 09, 2013

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|  |  |  |  |
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| **Version** | **Date** | **Author** | **Change Description** |
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| 1.1 | 09-09-2013 | IT Governance Branch (ITGB) | Re-formatted the document. |
| 1.2 |  |  |  |
| 1.3 |  |  |  |

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# Glossary

| **Acronym** | **Description** |
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# System Overview

This section provides a brief description of the information system and the high level functionality provided by the system.

## **Purpose, Scope, and Objectives**

**Purpose of the System**

Describe the purpose of the system.

**Scope**

Provide a description of the intended scope of the system, how it will accomplish its purpose.

**Objectives**

List the functional Capabilities that will be provided in a solution. Describe in terms of problems that will be solved, issues to be addressed or functions to be performed.

1. Capability Shortfall, Problem or Issues to be addressed
   * 1. Improvement#1
     2. Improvement #2
     3. Improvement #3

For example:

* Provide optimal reach to audiences
* Better serve specific audiences
* Broaden user base

1. Functions

List functions to be performed.

* + 1. Function #1
    2. Function #2
    3. Function#3

For example:

* Provide updated and expanded data
* Enhance functionalities and capabilities
* Employ up-to-date technology

**Business Needs**

Specify business needs to be satisfied.

**Start and End Dates of the Project**

MM/DD/YYYY to MM/DD/YYYY.

**Exclusions**

Specify any scope or objectives to be excluded.

## **System Overview**

Provide a brief system overview description as a point of reference for the remainder of the document.

**System Description**

Describe the system in narrative form using non-technical terms.

**Name of System**

Identify the system by its official Title. Also indicate acronym or short name if applicable.

**Sponsor Organization**

Enter the name of the organization that initiated and is champion of this effort.

**System Category**

Select from following categories:

1. Small Project
   * + 1. Expected cost is less than $25,000
       2. Risk and complexity are low
       3. An individual unit is involved
       4. Expected duration is less than 4 months
2. Medium Project
   * + 1. Expected cost is $25,000 to $500,000
       2. Complexity is medium to high
       3. Multiple people/departments are involved
       4. Expected duration is less than a year
3. Large Project
   * + 1. Expected cost is greater than $500,000
       2. Full Project Management methodology is required
       3. Expense, risk, or complexity are high
       4. Large number of people/departments is involved.
       5. Anticipated lifecycle is long

## **Operational Status**

Select the operational status of the system:

1. Operational
2. Under development
3. Undergoing a major modification

## **Authorized Use Permission**

Provide a warning regarding unauthorized usage of the system and making unauthorized copies of data, software, reports, and documents, if applicable. If waiver use or copy permissions need to be obtained, describe the process.

## **Points of Contact**

List the names, titles, and contact information of the major participants in the project.

**Information**

Provide a list of the points of organizational contact (POCs) that may be needed by the document user for informational and troubleshooting purposes.

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Title | Contact Phone Number | Contact Email |
|  | Help Desk POC |  |  |
|  | Development/Maintenance POC |  |  |
|  | Operations POC |  |  |

**Help Desk**

Provide help desk information including responsible personnel phone numbers for emergency assistance.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Title** | **Contact Phone Number** | **Contact Email** |
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## **Organization of the Manual**

Provide a list of the major sections of the Maintenance Manual (1.0, 2.0, 3.0, etc.) and a brief description of what is contained in each section.

# System Description

The following sections present the architecture of the application from a system perspective. The first section describes the system infrastructure, the hardware configuration and description of components, followed by a section that describes the software architecture from a high-level perspective. The final section describes the database infrastructure and security guidelines.

## **System Software Architecture**

Provide a description of the system, subsystems, communications, etc., in terms of their overall relationships. Accompany the description with a graphic representation that depicts the interrelationships of the major components of the system. Show the communications network for systems that are networked or that support distributed processing.

## **Hardware and Software Requirements**

Briefly describe the minimum hardware requirements to use this system. Also describe the versions of the software required to be installed on your local machine before you can use the system in question.

# Getting Started

This section provides a general walkthrough of the system from initiation through exit.



## **Logging On**

Describe the procedures necessary to access the system, including how to get a user ID and log on. If applicable, identify job request forms or control statements and the input, frequency, reason, origin, and medium for each type of output.

## **System Screen**

This section describes in general terms the system screen first encountered by the user, as well as the navigation paths to functions noted on the screen. Each system function should be under a separate section header, 3.2.1 - 3.2.x.

## **Changing User ID and Password**

Describe how the user changes a user ID. Describe the actions a user must take to change a password.

## **Exit System**

Describe the actions necessary to properly exit the system.

# System Training Procedures

This section provides information about the specific procedures necessary for a newcomer to work with the system.



## **Tasks**

This section provides each of the different tasks in the system training procedures along with screen captures for each of the tasks.

**Task 1 <task 1 name>**

This section provides each of the different sub-tasks in the system training procedures along with screen captures for each of the tasks.

**Task 2 <task 2 name>**

This section provides each of the different sub-tasks in the system training procedures along with screen captures for each of the tasks.

## **Special Instructions for Error Correction**

Describe all recovery and error correction procedures, including error conditions that may be generated and corrective actions that may need to be taken.

## **Caveats and Exceptions**

If there are special actions the user must take to insure that data is properly saved or that some other function executes properly, describe those actions here. Include screen captures and descriptive narratives, if applicable.

# Reporting

This section describes and depicts all standard reports that can be generated by the system or internal to the user. Use screen prints as needed to depict examples of text under each heading.



## **Report Capabilities**

## **Report Types**

Describe all reports available to the end user. Include report format and the meaning of each field shown on the report. If user is creating ad hoc reports with special formats, please describe here. A separate subsection may be used for each report.

## **Report Procedures**

Provide instructions for executing and printing the different reports available. Include descriptions of output procedures identifying output formats and specifying the output’s purpose, frequency, options, media, and location.

# Appendix A: References

Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.

The following table summarizes the documents referenced in this document.

|  |  |  |
| --- | --- | --- |
| **Document Name** | **Description** | **Location** |
| Document Name and Version Number | Document description | URL or Network path where document is located |
|  |  |  |
|  |  |  |

# Approvals/Signatures

The undersigned acknowledge that they have reviewed the [name of document] document and agree with the information presented within this document. Changes to this document will be coordinated with, and approved by, the undersigned, or their designated representatives.

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: | [Project or System Name] Project Manager |  |  |
|  |  |  |  |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: | [Project or System Name] Business Owner |  |  |
|  |  |  |  |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: | Organization’s Approving Authority |  |  |

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