

# COS 497: Capstone II

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## USER GUIDE TEMPLATE

(ADAPTED FROM JOHN BRINKWORTH AND BILL WAGHORN)

### General Instructions

1. Provide a cover page that includes the document name, product name, customer name, team name, team member names, and the current date. You may include your team logo.
2. Number the pages of the document.
3. Number and label all figures. Refer to the figures by number in the text.
4. All sections should have an introductory sentence or two.
5. Do not use vague words and phrases such as may, might, could, possibly, assumed to be, some, a little, and a lot. Use strong, definite words and phrases such as shall, will, will not, can, and cannot. Words such as “should” can be used sparingly to show suggestions.
6. Watch your spelling, punctuation, and grammar. It is a reflection on your professionalism.

Be sure that your document is

- Complete - No information is missing
- Clear - Every sentence's meaning must be clear to all parties
- Consistent – The writing style and notation is consistent throughout the document and the document does not contradict itself
- Verifiable - All requirements and other facts stated are verifiable

Remember that you are required to do a team review of this document.

Notes:

- Sparingly use technical, domain-specific prose targeted to the anticipated audience (*i.e.*, the uninitiated user).
- Do **not** assume your audience has already read any of your technical documents (*e.g.*, SRS, SDD), but reference particular sections of those documents when warranted.
- You may reuse as much of any of your previous manuals as you wish.
- It is difficult to give paragraph estimates for any part of this document. Entire sections of the template may be irrelevant for your software. Use the template as a guide.

When you think you are done with the User Guide, ask yourself, "Could someone who was not part of the development of this product use the system from the instructions in the User Guide?"





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***Template for COS Capstone Project***

***Template for User Guide***

***User Guide***

***Issue 1***

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## 0. PREFACE – PLEASE READ FIRST

- #1 *This Preface is addressed to the users of this generic document and is not meant to be retained in any project-specific User Guide documents based on it.*

### 0.1 PURPOSE OF THIS DOCUMENT

- #2 *This document is a generic User Guide document for use by COS Capstone projects. It provides guidance and template material which is intended to assist the relevant management or technical staff, whether client or supplier, in producing a project-specific User Guide document. It is also useful background reading for anyone involved in developing or monitoring the COS Capstone projects.*

### 0.2 USE OF THIS DOCUMENT

- #3 *The remaining sections (numbered 1, 2, 3,...) constitute a template that should be used to construct the project-specific User Guide document.*
- *Text in normal case is in the most part “boilerplate” that can be retained, amended or deleted in the document.*
  - *Text in italics provides instructions on how to complete a section and should be removed once the section is written.*
- #4 *The template should be used pragmatically, that is - where a section is not relevant it should be omitted. Conversely, the material contained in this document is not necessarily exhaustive; if there is a subject that is relevant to the project, but is not included in this document, it should still be included.*
- #5 *This document has been prepared using MS Word from MS Office 365. The following variables are currently recorded as File “Properties” under MS Word. They may be modified by that means or overwritten directly at each occurrence in the document, at the discretion of the user.*

a. “Summary” Properties

Title	Type of document ( <i>i.e.</i> , User Guide)
Author	Author(s) of document
Keywords	Document reference ( <i>i.e.</i> , COS Capstone User Guide)

b. “Custom” Properties

Project	Full name of the COS Capstone Project (set, in this document, to “ <b>Template for COS Capstone Project</b> ”)
Version	Issue number (currently Issue 1)
Date	Date of document (currently 4 April 2019)

### 0.3 FUNCTION OF USER GUIDE

- #1 *A User Guide is a document designed to help users and potential users of a system. But there are many possible variants within that. A User Guide may be*
- *a guide to the whole system or to a component package*
  - *written before or after development*
  - *designed primarily for training or for reference purposes*
  - *intended for use by a designated type of user (See 1.1).*

### 0.4 PRODUCTION OF USER GUIDE

- #1 *In general, there should be one overall User Guide for each COS Capstone Project. There may also be subsidiary User Guides for specific parts of the system or for specific classes of user.*
- #2 *There may also be separate User Guides for bought-in software packages used within an COS Capstone Project, but provision of appropriate “Help” files for each package will usually make such documents unnecessary.*
- #3 *The User Guide(s) should be written in the context of an “operation and support plan” or somesuch, which should be included in the Global Implementation Plan. This should cover such issues as:*
- *how much training will be given? how?*
  - *how self-sufficient are users expected to become?*
  - *how embodied in broader business processes will use of the system become?*
  - *how much support will there be?*
- #4 *It is recommended that a complete outline User Guide be drafted prior to any development within an COS CAPSTONE Project, as a companion to the User Requirement document*
- *as evidence that the specification in the User Requirement document are consistent and coherent*
  - *to give the user community a clear indication of what they can expect to be getting*
  - *to provide the developers with a useful view of their target, and a reminder of the need to assess specification changes from the user perspective.*

### 0.5 FORMS OF USER GUIDE

- #1 *Give some thought to the form of presentation of the User Guide. What form will offer the users an appropriate level of utility and convenience without incurring excessive costs for production, distribution and maintenance? Will it be US-letter-sized, portrait, single-sided, and unbound? Will it be landscape, double sided, wire-bound? Or what?*

- #2 *Avoid having User Guides which are subject to loose-leaf updating. These are always very expensive to maintain (unless user time is of zero value) and they are always very unreliable and therefore of limited utility.*
- #3 *Note that the paper element of a User Guide might be very small. The main part should be available on-line, in accordance with modern practices, and particularly the thrust of COS CAPSTONE, which is to move away from paper. The User Guide may therefore be primarily embedded in a set of HTML pages or a Help file.*
- #4 *There should also be provision for an active User Guide – one which answers the question “How Do I?” with a Wizard that helps.*
- #5 *Consider the desirability, in certain circumstances, even where the bulk of the User Guide is available on-line, of developing a “quick reference” guide, e.g. the folded sheet of letter-sized paper which is stuck to the side of the monitor.*

## **0.6 RELATED DOCUMENTS**

- #1 *The following documents are specifically related to the User Guide document.*
  - a. *For the COS CAPSTONE Project*
    - SRS document*
    - SDD Plan*
    - UICC document*
  - b. *For a development contract within a COS CAPSTONE Project*
    - CIR document*
    - AM document*

<p><b>The remainder of this document comprises a skeleton of a User Guide document. Throughout there are embedded instructions and <i>guidelines in italics</i>, as in this paragraph. All such material should be omitted from the User Guide document itself, as should the whole of this Preface.</b></p>
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## INTRODUCTION

#1 *Provide a brief description of the project, the customer, and the software.*

1.1 Intended Readership

#2 *Define the categories of user to whom the User Guide is addressed. Note that these may be, for example, e.g.*

- *end users*
  - *specialists, accessing the system for a significant proportion of their time, possibly for specific types of operational function*
  - *“casual” users making occasional use of the system*
- *various types of system operator, including*
  - *data entry staff*
  - *system administrators, concerned e.g., with system installation, user registration, system accounting, data administration, security, performance*
  - *user support staff (“Help Desk”).*

#3 *For each identified category of users:*

- *define the level of experience assumed*
- *state which sections of the User Guide are most relevant to their needs.*

#4 *Consideration should be given to the users being non-native English speakers.*

## APPLICABILITY STATEMENT

#1 *Define the software release(s) that this issue of the User Guide applies to.*

## PURPOSE

#1 *Define both the purpose of the system and the purpose of the User Guide.*

#2 *Name the process to be supported by the system and the role of the User Guide in supporting that process.*

## HOW TO USE THIS DOCUMENT

#1 *Describe what each section of the document contains, its intended use, and the relationship between sections.*

## RELATED DOCUMENTS

#1 *List all the documents referred to in this document*

Num	Title	Author	Date	Issue



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## CONVENTIONS

- #1 *Summarise symbols, stylistic conventions and command syntax conventions used in this document.*
- #2 *Examples of stylistic conventions are bold type and Courier font to distinguish user input. Examples of syntax conventions are the rules for combining commands, keywords and parameters.*

## PROBLEM REPORTING INSTRUCTIONS

- #1 *Summarise the procedure for reporting software problems.*

## OVERVIEW

- #1 *This section should provide a broad description of the system and should give the user a general understanding of its capabilities and how they are invoked.*
- #2 *The system should be described primarily from an external 'black box' point of view, i.e., the discussion should be concerned with functions, input and outputs that the user will see. However, where it helps explain to the users what the system does, the black box view can be partially elaborated with an explanation of what parts of the system provide the capabilities specified.<sup>1</sup>*
- #3 *This section may also include assumptions on the level of expertise required, e.g., use of a browser for web-based applications, picking a value from a drop-down list.*

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<sup>1</sup> Indeed, it is sometimes expedient, as an aid to comprehension, to describe a structure which is materially different from but functionally equivalent to that of the real system.

## INSTRUCTIONS

- #1 *This section should aim to give new users an understanding of how to operate the system.*
- #2 *For each operation, provide:*
  - a. *functional description*
  - b. *cautions and warnings*
  - c. *procedures, including,*
    - *set-up and initialisation*
    - *input operations*
    - *what results to expect*
  - d. *probable errors and possible causes*
- #3 *Care should be taken to present these operating instructions in a manner and structure suited to the needs of the users rather than according to the perspective of the development staff. The purpose of the User Guide is to help the user use the system effectively, safely and congenially, rather than to help the user understand the technicalities of how the system is constructed.*
- #4 *For end users in particular this entails organising the User Guide in accordance with the processes and functions of the application, i.e., of the overall system of activity in which the user participates and to which the telematics system provides support.*
- #5 *Specialist end users, who may be expected to accessing the system for a significant proportion of their time, may be deemed to require a training course before using the system. In that case the User Guide may be conceived more as a training manual than as an operational reference book.*
- #6 *A User Guide on paper is less likely to be useful to “casual” users who make only occasional use of the system. Experience says that such users will rarely consult a manual. So for them the bulk of the User Guide information has to be available on-line, supported by a good indexing system and (ideally) some diagnostic wizards. And the need for even that should be minimised by making system operation as simple, normal, intuitive, and forgiving, as possible.*
- #7 *For all types of user there is a potential need for instructions (possibly different for different types and classes of users) concerning such things as how to*
  - *initiate a session of usage*
  - *register as a new user*
  - *change a password*
  - *diagnose a problem*
  - *obtain help*
  - *report a fault*
  - *terminate a session.*

- #8 *Users who are not “end” users, directly concerned with the application itself, but rather concerned with the operation and support of the system, require their own forms of operating instructions. These may be in separate sections of a common User Guide or in separate documents.*
- #9 *Topics to be addressed might include, for example, any or all of the following.*
- a. user administration and support*
    - *registration of users*
    - *assignment of capabilities (usage permissions)*
    - *user supervision and Help Desk functions*
  - b. security administration*
    - *password administration*
    - *data sensitivity control*
    - *data encryption*
    - *authentication of users and equipment*
    - *protection against viruses and other malevolent agents*
  - c. data administration*
    - *set-up and maintenance of system data*
    - *storage space allocation and management*
    - *data back-up and recovery*
    - *verification of data integrity*
    - *correction of data corruption*
  - d. usage and performance*
    - *collecting and reporting on measures of system behaviour and performance*
    - *system usage accounting and charging*
    - *performance tuning*
  - e. control of system operation, including*
    - *starting and stopping*
    - *allocation of resources, adjudication on conflicts*
    - *monitoring of activity levels*
  - f. operational control of telecommunications, including*
    - *establishment and verification of links to new players*
    - *supervision and control of network operation*
    - *diagnosis of telecommunications malfunctions*
    - *telecommunications status reporting*
  - g. system management*
    - *system installation*
    - *verifying the correctness of system operation*
    - *diagnosis of system faults*
    - *configuration control*
    - *change control*
    - *registration and management of reports of system malfunction.*

## REFERENCE SECTION

- #1 *This section should give comprehensive information about all the system capabilities.*
- #2 *Describe each operation, including:*
  - h. Functional description*
  - i. Cautions and warnings*
  - j. Formal description, including as appropriate:*
    - *required parameters*
    - *optional parameters*
    - *default options*
    - *order and syntax*
  - k. Examples*
  - l. Possible error messages and causes*
  - m. Cross references to other operations*
- #3 *Where all the details which this section would contain are included in comprehensive on-line “Help” files, the distributed version of the User Guide document may omit this section, and include just a reference to the “Help” files. However, it may even then be found preferable to include all details in the User Guide document, at least while the system is under development.*

## ERROR MESSAGES AND RECOVERY PROCEDURES

- #1 This section should list all the error messages. It should not simply repeat the error message, but should also give a diagnosis and suggest recovery procedures.*
- #2 If recovery action is likely to involve loss of inputs or loss of stored data, the user should be reminded about backup and archiving procedures.*
- #3 Where all the details which this section would contain are included in comprehensive on-line “Help” files, the distributed version of the User Guide document may omit this section, and include just a reference to the “Help” files. However, it may even then be found preferable to include all details in the User Guide document, at least while the system is under development.*

## GLOSSARY

- #1 *A glossary should be provided if the manual contains terms that users cannot be assumed to know, or that are ambiguous.*
- #2 *Optionally, at the discretion of the developers, the Glossary may be merged with the Index below, giving the reader a combined a statement of*
- *what the terms mean*
  - *where in the document they are used (including perhaps where they are defined in more detail).*

## INDEX

*for manuals of 40 pages or more*





## **APPENDIX A – TEAM REVIEW SIGN-OFF**

Place on a separate page. Provide a brief paragraph stating that all members of the team have reviewed the document and agree on its content and format. Provide lines for typed names, signatures, dates, and comments for each team member. The comment areas are to be used to state any minor points regarding the document that members may not agree with. Note that there cannot be any major points of contention.

## **APPENDIX B – DOCUMENT CONTRIBUTIONS**

Identify how each member contributed to the creation of this document. Include what sections each member worked on and an estimate of the percentage of work they contributed. Remember that each team member must contribute to the writing (includes diagrams) for each document produced.