

User Guide Template

Use this guide to help a user understand a product, complete a first task, and carry out routine work. Keep explanations, task instructions, lookup information, and troubleshooting separate so a reader can find the kind of help they need.

Complete the bracketed fields with approved information for the product, organization, or program being documented. Repeat the named forms where several tasks or subjects need separate records. Remove sections that do not apply and retain links to the material used to complete the document.

Document control	Entry
Document identifier	[Identifier used by your team]
Scope and applicable version	[Product, program, locations, and version covered]
Prepared and maintained by	[Responsible role or team]
Revision and review	[Revision, review date, and approval reference]

Introduction

Identify the product, user, and guide boundary before the task material. Explain the conventions used to distinguish interface labels, user input, and important notices.

Field	Complete with
Product and scope	[Product, edition or version, covered capabilities, and exclusions]
Intended users	[User roles, prior knowledge, and required qualifications]
Guide conventions	[Interface labels, input formatting, symbols, and signal words used]
Related information	[Prerequisite learning, administrator guide, and authoritative references]

Safety and Important Notices

Include the precautions established for the product and place them before the tasks they affect. Keep the consequences and required actions faithful to the source.

Field	Complete with
Notice	[Hazard, data-loss, security, privacy, or other important source-stated precaution]
Affected task	[User action or product state to which the notice applies]
Required action	[Precaution, qualification, preparation, or safe-state procedure]
Reference	[Applicable version, source message, and supporting procedure]

Product Overview

Explain the concepts and interface areas a user needs before starting work. Give each concept a clear purpose and connect it to the tasks that use it.

Field	Complete with
Concept or component	[Name, purpose, and relationship to other product concepts]
User roles	[Capabilities, access boundaries, and relevant administrator responsibility]
Interface orientation	[Screen, control, navigation location, and purpose]
Typical workflow	[User goal, main stages, input, and expected result]

Getting Started

Document the path to a first useful result. Keep installation or access, account activation, and initial configuration in the order a new user performs them.

Field	Complete with
First task	[Goal, intended user, applicable version, and expected outcome]
Prerequisites	[Account, permissions, tools, inputs, and required setup]
Setup sequence	[Access or installation, initial settings, and source-defined precautions]
First result	[Observable completion, saved result, and recovery if setup fails]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Using the Product

Repeat the task record for each user goal and title it with an action phrase. Keep routine user tasks separate from administration, and split variants when the steps differ.

Field	Complete with
Task title and outcome	[One user goal and the result the procedure produces]
Before starting	[Permissions, product state, input, dependencies, and relevant warnings]
Task actions	[Ordered steps using exact interface labels and meaningful decision points]
Completion and next task	[Expected result, saved output, follow-up task, and failure handling]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Administration and Maintenance

Document administration only where the user is authorized to perform it. Identify the role and the operational effect before giving a configuration or maintenance procedure.

Field	Complete with
Administrative task	[Purpose, applicable role, affected users, and version]
Prerequisites	[Access, approval, backups, dependencies, and current state]
Change or maintenance	[Configuration, account, update, backup, or maintenance action]
Verification and reversal	[Expected result, evidence, approved reversal, and escalation]

Repeat this procedure for each supported task or variant. Place the applicable warning before the affected action and record a result that can be checked.

Step	Action	Expected result	Evidence
1	[One action using the exact interface label or approved command]	[Observable state]	[Check or record]
2	[Next action in dependency order]	[Observable state]	[Check or record]
3	[Verification or handover action]	[Completion condition]	[Retained evidence]

Reference

Keep exact values and definitions in lookup records and link them from the tasks that use them. Identify the product version and environment where a value applies.

Field	Complete with
Reference topic	[Setting, field, command, shortcut, specification, or limit]
Definition	[Exact name, purpose, type, allowed values, units, and documented default]
Usage	[Applicable role, task, dependency, and effect of the selected value]
Source	[Authoritative document or interface reference and applicable revision]

Troubleshooting and Questions

Organize fault records by the symptom a user observes. Keep a usage question separate from a fault that requires diagnosis.

Field	Complete with
Symptom or question	[Exact error, observed behavior, or recurring question]
Checks and explanation	[Relevant state, diagnostic steps, or source-supported answer]
Resolution	[Supported action, procedure reference, and expected result]
Escalation	[Condition requiring help, support route, and redacted evidence to provide]

Glossary

Use the glossary for product-specific words and abbreviations. Keep each definition consistent with the concept and reference records.

Field	Complete with
Term	[Product term or abbreviation]
Definition	[Meaning used in the guide]
Related concept	[Concept, component, interface label, or reference entry]
Usage	[Preferred wording, synonym, or distinction from another term]