

[Tool or role] training manual

Replace every text in [brackets] and delete these grey hints when done. Each module starts with a Heading 1 "Module ..." and each task with a Heading 2 "Task ...", so Word's Navigation pane lists the whole manual. About this manual and Reference are Heading 1 too, but they are not modules.

Table of contents: put the cursor here, then in Word References > Table of Contents, in LibreOffice Insert > Table of Contents and Index > Table of Contents, Index or Bibliography. A cover page is optional: Insert > Cover Page in Word, or a title page before this line.

About this manual

Who it is for	[Role, and what they already know]
Before you start	[Accounts and roles needed, access to the test environment, test data]
How to use it	[Work through the modules in order. Do each task on test data, then do the check without the manual open.]
Owner	[One name and team]
Version and next review	[1.0, date. Review when the tool changes its screens]

Module 1: [What the trainee learns, as a topic]

Objective	[After this module the trainee can ... One sentence, a verb you can watch: export, refund, void, not "understand"]
Tasks	[1.1 ..., 1.2 ..., 1.3 ...]
Time	[Minutes for the tasks plus the check]

Task 1.1: [Verb + object, the way people ask for it]

When	[The event that starts it]	
Work instruction	[Title of the work instruction and where it lives, if it exists outside this manual]	
#	Step	
1	[One action with the exact label in bold: In Search orders , type ...] [Screenshot of this step, cropped to the area that matters, one marker on the click target]	
2	[] [Screenshot]	
3	[] [Screenshot]	
Expected result	[What is on screen when it worked]	
If it fails	[The common error and what to do, or who to ask]	

Task 1.2: []

[Copy the task block above for every task in the module.]

Check: Module 1

[The trainee does the tasks on test data, without the manual open. No quiz about menu names.]

#	Do this on test data	A correct result looks like	Done
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1	[Task with the exact test record: order, invoice, date range]	[What the trainer sees on screen]	[]
2	[]	[]	[]
3	[]	[]	[]

Pass: [all tasks done without the manual open]. Checked by: [name], date: [].

Module 2: []

[Copy the Module 1 block. Order modules by what must be learnt first, then by how often the task comes up, then by what breaks if it is done wrong.]

Reference

Glossary

Term in the tool	What it means here
[]	[]
[]	[]

Who to ask

Topic	Name and channel
[]	[]

Change log

Date	Module	What changed
[]	[]	[]