Overview

Purpose

The purpose of this guide is to provide grammatical, graphical, and visual recommendations for drafting Step-by-Steps. This provides learners/clients with a consistent deliverable that appears authored by a single person, even if developed by a team.

Definition

Step-by-Steps (SBS) are defined as:

- Showing or explaining each stage in a process.
- Happening or done in a series of steps or stages.

Project Style Guide

Every client will have different expectations for how a SBS should look for the project/company. This guide provides a foundation for deciding how to draft SBS for the project you are working.

Before developing any training materials, it is recommended that a project lead work with the client to determine the styles and appearance of the deliverable materials. Often our clients will be okay with our document standards, but occasionally the client will have changes. Document the outcome of these meetings and decisions in a style guide. You may choose to include project SBS styles and conventions into a single style guide for all deliverable documents, or keep them separate as has been done here.

NOTE: CONSULT THE PROJECT STYLE GUIDE AS THE PRIMARY SOURCE OF INFORMATION. CONSULT THIS STYLE GUIDE IF A PROJECT STYLE GUIDE DOES NOT EXIST.

Step-by-Step Contents

Consider the following topics when making a project style guide, which are also included in this document:

- SBS Elements
- Information Conventions
- SBS Styles
- Action Conventions
- Hyperlink Conventions
- Multi-touch Screen Conventions
- SBS Examples

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AutoCorrect Codes

Overview

The SBS starter document includes a shell for you to develop a Step-by-Step procedure. The autocorrect codes found in the instructor/participant guide codes can help you develop SBS.

The first step is added using the **qq2** autocorrect code. Press **Tab** after a step to add another numbered step. If you have a break between steps (for a note, for example), use the **qq2** autocorrect code to create a new row to resuming the numbering.

Code	Use for…
qq1	Course content and instructor notes
qq2	Numbered steps in a procedure
qqActivity	Activity details and instructor notes
qqAid	Job aid titles and instructor notes
qqAssumption	Listing preconditions before beginning a SBS procedure
qqContinue	Highlighting behavior that should continue
qqDiscuss	Discussion topics and instructor notes
qqError	Identifying error messages and resolutions/workarounds
qqIfThen	Inserting an If/Then table
qqImportant	Highlighting important information
qqNote	Making notations
qqSBS	Listing step-by-step procedures
qqStart	Highlighting behavior that should begin
qqStop	Highlighting behavior that should stop
qqTerm	New or key terminology and instructor notes
qqTip	Providing tips
qqWarning	Calling out warnings

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Step-by-Step Elements

Overview

Consistency between SBS, and within SBS, is important to prevent the learner from being distracted.

The following table documents the elements typically included in SBS. For examples of these elements in use, see the **SBS Examples** section.

Assumption	Use an assumption statement to clarify where a user should be in the system when starting a procedure (such as what panel/screen appears), the action that must be taken, or the condition that must exist before a procedure can begin. Example: **Assumption**: You are logged in to the system and on the Home screen. **NOTE: IF THERE IS NO ASSUMPTION STATEMENT FOR A TASK, THEN INTRODUCE THE TASK WITH A BRIEF DESCRIPTION OF ITS PURPOSE. NEVER USE PASSIVE VOICE.**
Content of Steps	Each step should contain only one action.
Number of Steps	A single task should take between five and nine steps to complete. If the task is longer than nine steps, try to incorporate a “chunking” technique: Combine similar steps into a bulleted list (see **Bulleted Lists** below). Break the task into separate tasks. Look for navigation steps (can be put into a secondary task accessed through a hyperlink), steps on a new window, or on a separate section of the same window.

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Decision Tables

Use a decision table to give users an option for the next step they should take. Instead of writing a choice in one sentence, use an If/Then table to indicate that there is more than one option for the next step, depending on the context of that particular user's reason for completing the task. Use the following introduction and format:

Example:

1. Use the following table to determine your next step:

You know the Material Request Number,	Enter the ***Material Request number*** in the **Mtl Request** field
You do not know the Material Request Number,	See Searching for a Material Request

Icons and Screenshots

Insert images of buttons or icons to the SBS after the word(s) describing the screenshot. Screenshots should be consistent in size, color, and formatting style. We will not include other screenshots of system screens due to size limitations.

Example:

Click the **Search**  icon.

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Information Conventions

Overview

Include additional information to clarify what is required from the user, to help understand contextual changes, or to help the user avoid common pitfalls.

Format additional Information clearly to differentiate it from actions. This document uses the **INTENSE REFERENCE** style.

Note	Use a **Note** to give users "nice to know" information that may be helpful in completing the task but is not necessary and, if the note information is not used, it will not affect the results of the task. The project SBS template has incorporate a distinctive icon for a Note.
Result	Use a **Result** to indicate to users that after the step is completed, the information contained should occur. This applies to default fields that do not need to be filled in by the user. The need for a Result link occurs most often after users press Enter and something contextual changes on their screens. Example: **RESULT THE SAVE AS POPUP WINDOW OPENS ON YOUR SCREEN.**
Warning	Use a **Warning** to indicate to users that not understanding the information contained in the warning could negatively affect the result of the task. Example: **WARNING: DO NOT PRESS THE ADD BUTTON. DOING SO WILL CREATE A NEW RECORD INSTEAD OF ALLOWING YOU TO EDIT THE CURRENT RECORD.**

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Step-by-Step Styles

Overview	The following table identifies the styles typically included in SBS. For examples of these elements in use, see the **SBS Examples** section.

Bold Text	Use bold text in the step to indicate: • The names of user interface (UI) elements (for example, names of buttons, fields or sections of the window). • Exact data that the users must literally enter in a field. Example: Enter: **Consumer** in the **Type** field. Press: **Enter**.
Bold + Italic Text	Use bold, italicized text in the step to indicate a description of what type of information needs to be entered in a field, rather than the exact text that should be entered. In this situation, the required information will vary from user to user, or from situation to situation. The user determines the exact data to enter. Example: Type the ***Customer's Name*** in the **Resident** field.
Bulleted Lists	Use a bulleted list to condense a long set of steps into one step. If there are two or more steps that call for users to enter data, write it as one step. Example: Enter the appropriate information in the following fields: • **Catalog ID** • **UTC Number (if traceable)** • **Quantity** • **Return Reason**
Underline Text	Do not underline text, unless it is a hyperlink. Example: Go to the SAP login page at www.ClientHome.com.

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Action Conventions

Overview	Use a single word to describe the action that the user is to take. The word is to be one of the imperative verbs in the following list.

Access	Use Access when users need to access a panel using steps provided on a secondary panel. Example: Access The **P011 Material Request Print** panel Click Here. **NOTE THE HYPERLINK DISPLAYS A SECONDARY PANEL WITH THE STEPS TO ACCESS THE PANEL INDICATED.**
Choose	Use Choose when a user needs to pick one of a small number of items. Example: Choose either **Yes** to continue or **No** to Cancel the operation.
Click	Use Click when users need to single click a button with their mouse. We do not Click in or Click on. Example: Click the **Enter** icon.
Double-click	Use Double-click when users need to double-click a UI element to access the subsequent information on a different panel. Do not use the term Single-click. Example: Double-click The **Catalog ID** field to search for the ***appropriate catalog ID number***.
Enter	Use Enter when users need to determine what information to type/enter in the field. The specific information will vary from situation to situation. Example: Enter the ***catalog ID number*** in the **Catalog ID** field.
Go To	Use Go To when an *advanced* user needs to navigate to a well-known area of the application. Do not use this action verb for beginning users. Instead, provide steps to complete the navigation. Example: Go To the **Main** tab of **Control Central**.

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Action Conventions, continued

Right-click	Use Right-click when users need to right-click with the mouse in a field to complete the step described. Do not use the term Left-click. Example: Right-click the **Recd Order** field and select **More Detail** from the drop-down menu.
Select	Use Select when users need to choose an option either from a drop-down menu in the field indicated, or from a list of items on a page. Example: Select the ***appropriate facility code*** in the **Facility** field.
Verify	Use Verify when users need to double-check the defaulted information in the field. Example: Verify the ***appropriate facility*** has defaulted in the **Deliver to Facility** field.

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Hyperlink Conventions

Overview	A hyperlink directs users to other related procedures, sites, or locations. This includes steps for accessing the referenced panel, and procedures the user might need to do before continuing with the currently displayed steps.
Click Here	Use a **Click Here** link to help users navigate to another SBS procedure related to the displayed SBS procedure. Use this link to access: • Steps to access the window on which the displayed task occurs. • Secondary steps within the displayed task. • Steps in a separate task. You will need to determine whether to include a link in the related task that enables the user to return to the original task.

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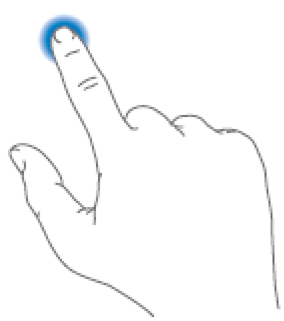
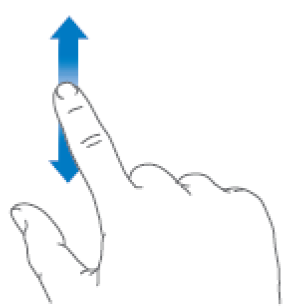
Multi-Touch Screen Conventions

Overview

A touch screen device allows the user to control the device by touching the screen with a stylus/pen or one or more fingers.

Use your fingers to manipulate icons, buttons, menus, the onscreen keyboard and other items on the touch screen.

Tap **Double-tap**	**Tap** to select or activate something. Type a name, search term, or password by tapping/touching where you want to type. A keyboard appears for you to type into the field. **Double-tap** to enlarge (zoom in). Double-tap a second time to return to the original size (zoom out). **Optional:** replace Touch for Tap  
Drag	**Drag** an item from one position on the screen to another. Tap/touch and hold an the item on the screen, and without lifting your finger, move your finger on the screen where you want the item to rest. 

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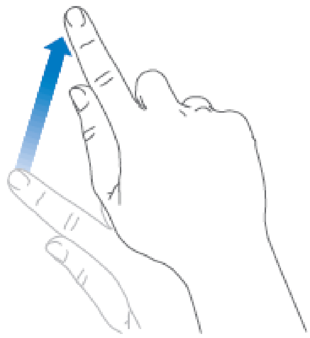
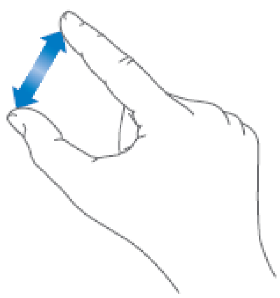
Multi-Touch Screen Conventions, continued

Swipe/Slide	Swipe/slide to move between menus, unlock the screen, etc. Quickly move your finger across the surface of the screen, without pausing. 
Pinch	**Pinch** the screen with your thumb and pointer finger and pull outward to zoom in on the screen. Zoom out by doing the reverse (start with your thumb and finger apart and pull inward). 
Long Press (optional)	Touch screen and hold for a few seconds. 

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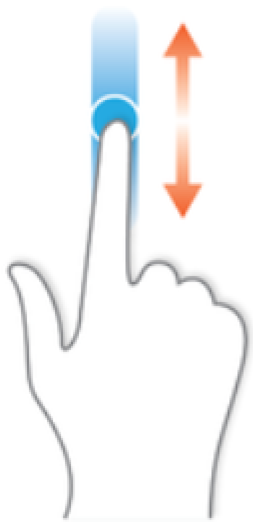
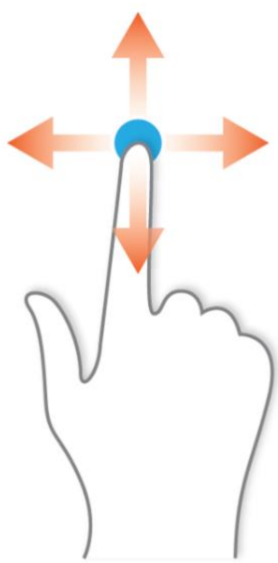
Multi-Touch Screen Conventions, continued

Scroll (optional)	Touch screen with finger and move your finger up or down. 
Pan (optional)	Touch screen and smoothly move one finger in any direction. 

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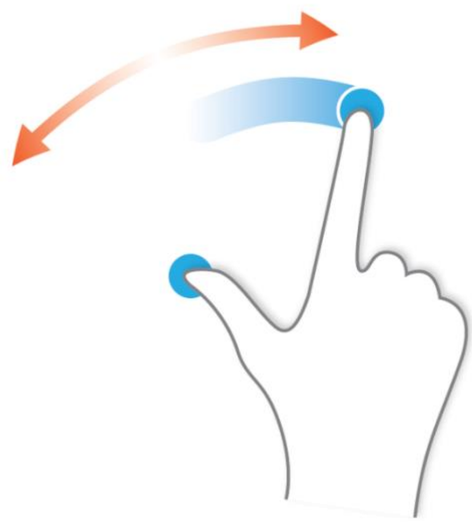
Rotate (optional)	Touch screen with two fingers and rotate clockwise or couter-clockwise smoothly. 

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SBS PROCEDURE EXAMPLE

Changing the Status of a PM

Assumption: You know how to locate the PM record you want to modify.

1. Click the **Go To** menu on the navigation toolbar.
2. Select **Preventive Maintenance** from the drop-down menu.
3. Select the **Preventive Maintenance** application.

   Result: The **Preventive Maintenance** application opens at the **List** tab.
4. Locate the PM record you want to modify.

Note: You can perform a basic or advanced search to locate the PM record. You can also click inside the **PM** field on the **List** tab and press **Enter** to display a list of existing PMs.

5. Select the PM record to display it on the **PM** tab.
6. Click the **Change Status** icon on the application toolbar, or select **Change Status** from the **Select Action** drop-down menu on the application toolbar.

   Result: The **Change Status** window displays.
7. Click the arrow for the **New Status** field to see the available statuses.
8. Select the appropriate status for the PM record.
9. Enter ***information*** regarding the status change in the **Memo** field if necessary.
10. Click the **OK** icon.

    Result: The status of the PM record is changed according to your selection, as reflected in the **Status** field on the **PM** tab.

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<u>Inventory</u>

Searching for a Catalog ID from the D200 Panel

Use the following procedure to search the Master Materials Catalog from the D200 panel.

1. From the **Main Menu**,

   Enter **D200** in the **Command** field.

2. Press: **Enter**

   Result the **D200 Master Materials Catalog panel** displays.

3. Enter the appropriate ***code*** in as many of the following fields for which you have information.

   Note: You can prompt for this information instead. Entering data into certain combinations of fields will force the **QSET Query Set Selection** panel to display. In this event, go to the ***Searching the Master Materials Catalog by Query Set*** procedure to continue your search.

   - **Category**
   - **Name**
   - **Type**
   - **Facility**

4. Click the **Search** toolbar icon.

   Result: If only one item matches your search, the **Catalog ID** information populates the **D200** panel. If more than one item matches your search, either the D20S or the D20T panel displays all the Catalog IDs that match the search parameters you defined.

5. Use the following table to determine your next step:

The D200 panel displays,	Go to the next step.
Either the D20S or the D20T panel displays,	Double-click the **Action Column** of the appropriate Catalog ID. Result: The D200 panel displays the information for the selected Catalog ID.

6. Click the **Save** & **Close** toolbar icon to return to the **Main Menu** when your review is complete.

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Searching for a Catalog ID from a Blank Catalog ID Field

Use the following procedure to search for a Catalog ID from a blank Catalog ID field on any panel.

Assumption: You see a panel that contains a blank Catalog ID field.

1. Right-click: In the **Catalog ID** field and select **Prompt** from the menu.

   Result the D20C Catalog Facility, Catalog ID Prompt displays.

2. Enter the ***appropriate codes*** in the **Commodity** fields.

   Note: You can prompt in both fields to identify the needed codes.

3. Enter: ***One word or character string*** (e.g., 32vdc) in the **Keywords** field, if appropriate.

   Note: This search only allows one piece of information in this field. For example, entering “breaker” will produce multiple results; entering “circuit breaker” will produce nothing.

4. Press: **Enter**.

   Result the grid area displays a list of Catalog IDs that match your criteria.

5. Click the **Action Column** of the appropriate Catalog ID.

6. Press: **Enter**.

   Result: Your original panel displays again, with the Catalog ID number in the Catalog ID field.

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Create Maintenance Work Order (SAP)

T-Code: IW31

Go to: SAP menu > Logistics > Plant Maintenance > Maintenance Processing > Order > IW31 – Create (General)

1. Enter the Transaction code **IW31** in the **Command** field and press Enter.

   Result the **Create Maintenance Order: Initial Screen** displays.

2. Enter: ***Order type*** and ***planning plant data***. Press **Enter**.

3. Enter the following information in the **Header Data** tab:

   - **Description**
   - **Equipment Number**
   - **Main Work Center**
   - **Priority**
   - **Maintenance Type**

   Press **Enter**.

4. Enter the following information into the ***Operations*** tab:

   - **Data to the Short Text field**
   - **Number of capacities required**
   - **Duration of activity**

   Press **Enter**.

5. Enter the following information into the ***Component*** tab:

   - **Component**
   - **Required quantity**
   - **Item category (L for stock item; T for non-stock item)**
   - **Storage Location**
   - **Plant**

   Press **Enter**.

6. Click: Material availability check (Button P18).

   Result: The system displays message “All checked materials in order XXXX are available.”

7. Click the **Cost** tab

   Result: The Planned Cost displayed for Labor and Materials.

8. Click: **Save**.

   Result: The system displays a Maintenance Order number.

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Step-by-Step Examples, continued

Creating an Invoice

Assumption: You are in the Invoices application in the Purchasing module and have permission to create invoices. The work order the invoice is associated with must be in Approved status and set up to accept charges.

1. Click: **New Invoice** .

   RESULT: A NEW INVOICE RECORD IS CREATED AND AUTO-NUMBERED, AND DISPLAYS ON THE INVOICE TAB.

2. Click: **Select Date and Time** to complete the **Invoice Date** field.

   NOTE THE INVOICE DATE IS THE DATE ON THE INVOICE.

3. Enter the **G/L Posting Date**.

4. Click: **Select Value** to select the **Construction Office** where the invoice is being charged.

5. Click: **Details Menu** to select the **Company** to remit the invoice to.

   NOTE THE COMPANY MUST EXIST IN THE SYSTEM BEFORE YOU CAN REMIT AN INVOICE.

   RESULT THE COMPANY NAME WILL DISPLAY IN THE LONG DESCRIPTION FIELD AND THE ADDRESS WILL POPULATE.

6. Click: **Select Value** to select the **Construction Office** where the invoice is being charged.

7. Click: **Details Menu** to select the **Company** to remit the invoice to.

   NOTE THE COMPANY MUST EXIST IN THE SYSTEM BEFORE YOU CAN REMIT AN INVOICE.

   RESULT THE COMPANY NAME WILL DISPLAY IN THE LONG DESCRIPTION FIELD AND THE ADDRESS WILL POPULATE.

8. Enter or Select the **Contact person** for the selected company, if provided.

   NOTE: NOT ALL INVOICES LIST A CONTACT PERSON. THIS FIELD IS NOT REQUIRED.

9. Enter the **Invoice Total** from the invoice and press the **TAB** key.

   RESULT THE TOTAL BASE COST FIELD WILL AUTOMATICALLY POPULATE WITH THE INVOICE TOTAL AFTER YOU PRESS THE TAB KEY.

10. Click the **Invoice Lines** tab.

11. Click the **New Row** button.