

Software Functionality Scenario Template and Example For Teaching a Software Procedure

This document provides an example of a scenario used to teach concepts and key strokes required to perform a procedure in which computer software is a major component. The example below shows the elements of the scenario and provides an example of each.

Scenario Name: Basic Order Entry *(This is simply the name of the scenario, be as descriptive as possible.)*

Scenario Level: Simple *(The levels are simple, typical, complex)*

Instructional Objective: This scenario teaches the basics of the screen, the locations of the key information and what the user needs to do to complete a simple order. Does not include separate bill to or ship to addresses for an order. *(This describes the instructional objective of the scenario. It may also describe elements not covered within this particular scenario.)*

Storyline and Instructions: *(This describes the scenario and what is occurring. This needs to be related to an actual work task and situation)*

You are an order entry clerk responsible for taking customer orders over the phone. You have just received a call from Carlos who would like to order 50 pieces of 12 in by 2 in PVC 01 piping. Carlos Sanchez is a purchasing agent for the ReVar Pipe Company located at 221 East Rose Street, Butler, PA 16002 which has never before purchased from your organization.

You navigate to the correct location within your (manufacturing) MFG software and locate the New Order screen. It looks like the screen below.

Insert blank Order Entry (OE) screen here. (Order Header)

(this is a screen capture of appropriate screen.)

You ask Carlos if the Ship To and the Bill To addresses are the same. He tells you that both addresses are the same. You enter the information in the Ship To address field and check the field marked “*Ship/Bill Same.*” Next you ask for the requested delivery date for the item. Carlos tells you it is on June 5, 2002. You enter that information in the “*Due Date*” field. You should notice that default customer information appears such as the default payment terms for new customers and the default credit limit. The completed screen should look like the one below.

Insert completed Order Entry (OE) screen here (Order header).

The next step is to verify the information with Carlos and make any necessary changes. Once everything is verified and correctly entered, press the <Submit> button on the bottom left of the screen to move to the Order Entry Line Item Detail Screen.

The following screen should appear.

Insert the Line Item Detail Screen for Order Entry (OE) here

Notice that the top of the screen contains a summary of the information you entered on the Order Entry Header Screen. You ask Carlos for the item number of the type of piping he wishes to purchase. He doesn't know the item number but does have a brief

description written by the site manager for the project. Move your cursor from the default location in the “*Item Number*” field to the next field, “*Item Description*” using the <Tab> key or with the click of your mouse. Then click on the <Look Up> button on the bottom left of the screen (beside the <Submit> button). This will bring up the look up function. Type in the item description given to you by Carlos which is *12 in by 2 in PVC 01 piping*.

Once you have typed in the necessary information, click on the <Look Up> button again. The system will search and return the appropriate item. In this case it is item number 1246PVC01. Double-click on this item and it will appear as a line item on the order entry screen.

Move to the next field and type in the order quantity. Remember, Carlos wanted 50. This will automatically populate the per piece price and the total price when you click on another field or press the <Enter> key on the keyboard. The screen should appear like the one below.

Insert the Line Item Detail Screen for Order Entry (OE) showing completed line item for 50 of item # 1246PVC01.

Verify the quantity and price with Carlos. When everything is correct, click on the <Save> button on the bottom right hand side of the screen to generate an order number. When the order number is generated, read the number to Carlos and instruct him to refer to the number whenever he makes an inquiry concerning the order.

Notice this scenario contains screen captures at critical junctions within the process. It also addresses the learner in a first person mode. Using first person helps to translate the scenario into the job context so the learner can relate to the situation.