

Training Guide Template

The blank template, plus a filled-in example: Logging a Supplier Invoice

HOW TO USE THIS TEMPLATE

Part 1 is the blank template with all 13 sections. Replace each grey prompt with your own task details. Part 2 shows the same template filled in for one task, so you can see what a finished guide looks like.

Part 1: Blank template

Training Guide: *[Task name]*

1. Title and Document Control

FIELD	YOUR ENTRY
Guide title	<i>[Title]</i>
Owner	<i>[Name, role]</i>
Version	<i>[Number]</i>
Last reviewed	<i>[Date]</i>
Next review	<i>[Date]</i>

2. Purpose and Audience

FIELD	YOUR ENTRY
Why this guide exists	<i>[One sentence]</i>

FIELD	YOUR ENTRY
Who it is for	<i>[Role, experience level]</i>

How to use it	<i>[When to read it]</i>
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3. Learning Objectives

After this guide, the trainee can:

☐ *[Observable outcome]*

☐ *[Observable outcome]*

4. Prerequisites

FIELD	YOUR ENTRY
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Knowledge	<i>[What they must already know]</i>
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Accounts and access	<i>[Systems, permissions]</i>
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Tools	<i>[Software, equipment]</i>
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5. Role or Process Overview

FIELD	YOUR ENTRY
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Context	<i>[Where this task fits]</i>
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Key terms	<i>[Term: definition]</i>
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6. Step-by-Step Instructions

STEP	ACTION	SCREENSHOT
1	<i>[Action]</i>	<i>[Screenshot]</i>
2	<i>[Action]</i>	<i>[Screenshot]</i>
3	<i>[Action]</i>	<i>[Screenshot]</i>

7. Policies and Standards

FIELD	YOUR ENTRY
Rules	<i>[Rule]</i>
Permitted	<i>[Action]</i>
Not permitted	<i>[Action]</i>
Quality bar	<i>[What a finished task looks like]</i>

8. Examples and Scenarios

FIELD	YOUR ENTRY
Good example	<i>[Description]</i>
Poor example	<i>[Description]</i>

9. Tips and Common Mistakes

FIELD	YOUR ENTRY
Tip	<i>[Shortcut from experienced staff]</i>
Mistake to avoid	<i>[Mistake]</i>

10. Practice and Knowledge Check

FIELD	YOUR ENTRY
Exercise	<i>[Task to practice]</i>
Quiz questions	<i>[Question]</i>
Sign-off criteria	<i>[What passing looks like]</i>

11. Troubleshooting and FAQs

FIELD	YOUR ENTRY	FIELD	YOUR ENTRY
Problem	<i>[Symptom]</i>	Fix	<i>[Action]</i>
Escalate when	<i>[Condition]</i>	To	<i>[Name or team]</i>

12. Resources and Contacts

FIELD	YOUR ENTRY
Glossary	<i>[Link]</i>
Related documents	<i>[Link]</i>
Who to ask	<i>[Name, channel]</i>

13. Summary and Sign-Off

FIELD	YOUR ENTRY
Key points	<i>[Recap]</i>
Trainer	<i>[Name, date]</i>
Trainee	<i>[Name, date]</i>

Part 2: Filled-in example

A finance lead fills in the template for new employees, using one invented week-one task.

Training Guide: Logging a Supplier Invoice

1. Title and Document Control

FIELD	EXAMPLE
Guide title	Training Guide: Logging a Supplier Invoice
Owner	Lena Brooks, Finance Lead
Version	1.0
Last reviewed	2 Sep 2026
Next review	2 Mar 2027

2. Purpose and Audience

FIELD	EXAMPLE
Why this guide exists	Gets suppliers paid on time.
Who it is for	New accounts assistants
How to use it	To read before their first invoice run

3. Learning Objectives

After this guide, the trainee can:

☐

Log an invoice unaided

☐ Match its purchase order (PO)

☐ Flag mismatches

4. Prerequisites

FIELD	EXAMPLE
Knowledge	Finance induction done
Accounts and access	"Payables entry" login and invoices inbox access
Tools	Payables and the shared drive

5. Role or Process Overview

FIELD	EXAMPLE
Context	Assistants log, the finance lead approves, payment runs Thursdays.
Key terms	PO: purchase order

6. Step-by-Step Instructions

STEP	ACTION	SCREENSHOT
1	Save the invoice PDF to Invoices 2026	Folder
2	Open Payables, click New Invoice	Menu
3	Enter PO, supplier, date and total with VAT	Form
4	Attach the PDF, click Submit for Approval	Banner

7. Policies and Standards

FIELD	EXAMPLE
Rules	Log within two working days. Bank-detail changes go to the finance lead.
Permitted	Logging and attaching invoices
Not permitted	Approving your own entries
Quality bar	PO, supplier, date and VAT total match the invoice.

8. Examples and Scenarios

FIELD	EXAMPLE
Good example	Logged against PO 4471, totals match.
Poor example	No PO, VAT missing.

9. Tips and Common Mistakes

FIELD	EXAMPLE
Tip	Copy the PO from the email subject.
Mistake to avoid	Check resent invoices for duplicates.

10. Practice and Knowledge Check

FIELD	EXAMPLE
Exercise	Log three sample invoices correctly
Quiz questions	Explain how to handle a PO mismatch
Sign-off criteria	All three logged without errors

11. Troubleshooting and FAQs

FIELD	EXAMPLE	FIELD	EXAMPLE
Problem	PO not found	Fix	Ask the buyer.
Escalate when	Supplier missing	To	Lena Brooks

12. Resources and Contacts

FIELD	EXAMPLE
Glossary	Finance glossary on the shared drive
Related documents	Payables approval policy on the shared drive
Who to ask	#finance-help

13. Summary and Sign-Off

FIELD	EXAMPLE
Key points	Log within two days, match the PO.
Trainer	Lena Brooks, 9 Sep 2026
Trainee	Sam Patel, 9 Sep 2026