PharmForce Tutorial Script

Accessing and Logging in to Salesforce

Crescent Healthcare, Inc.

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Document Tracking

Approvals

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Revision History

Version	Date	Author	Notes
1.0	1/7/2010	Kevin Lewis	First draft.
1.1	1/18/2010	Kevin Lewis	Update scene 6 action and voiceover.

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Preface

This document contains the storyboard and script for creating an online tutorial for accessing and logging in to Salesforce.

1. Overview

The purpose of this tutorial is to teach the user the following concepts and procedures:

- The system requirements for using Salesforce, including specific requirements for PharmForce

- The URL for accessing Salesforce, including how to bookmark or create a shortcut to it

- Salesforce login credentials, including the user's login name and password

- How to log on to Salesforce, including how to remember their user name

- How to access specific applications in the Salesforce apps menu

2. Script

This chapter provides a description of the screens that must be used or captured (for computer screenshots) to create the tutorial, including the text, voiceovers, and screen components. It also describes system, mouse, and keyboard actions that must be caught to create the tutorial.

The script includes actors that either provide for a voiceover or invoke a system action:

- **System:** The system is the computer that is taking action within the tutorial. When you see this actor in the script, it is typically to perform an automated action such as opening a new page in the tutorial, displaying text on the screen, or clicking a button in a screenshot.

- **Voice:** The voice is the person or tool that provides the narration for voiceovers. When you see this actor in the script, it is typically to provide the lines that must be spoken in the tutorial.

- **User:** The user is the person viewing the tutorial. When you see this actor in the script, it is typically to show where the user is expected to take some action.

Scene 1: Title Page and Overview

➢ **1. Scene initialization:**

System: Fade in to the title page using the standard Crescent template for title pages. Include the following screen text:

- **Title:** Accessing and Logging in to Salesforce

➢ **2. Voiceover:**

Voice: Welcome to the Crescent Healthcare tutorial, "Accessing and Logging in to Salesforce."

➢ **3. Action:**

System: Wait briefly and then open the overview page using the standard Crescent template for overview pages. Include the following screen text, fading in each bullet item as it is introduced with the voiceover:

- **Page Title:** Overview

- **Bullet Items:**

  – Salesforce system requirements

  – URL for accessing Salesforce

  – Salesforce login credentials

  – How to log in to Salesforce

  – How to access applications

- **Button:** Start Tutorial

  Button Functionality: When clicked, this button advances the tutorial to the next scene.

➢ **4. Voiceover:**

Voice: This tutorial explains what you need to access Salesforce and how to log in to the system. You will learn:

- Salesforce system requirements…particularly, Web browser requirements for working with Salesforce and PharmForce

- The URL for accessing Salesforce, along with tips for bookmarking it or creating a shortcut to it

- Salesforce login credentials, which includes your user name and password for logging in to Salesforce

- How to log in to Salesforce, and

- How to access specific applications once you have logged in

Voice: Click the "Start Tutorial" button when you are ready to begin.

➢ **5. Action:**

System: Highlight the **Start Tutorial** button. Wait for the user to click the **Start Tutorial** button.

User: Click the **Start Tutorial** button.

Scene 2: Salesforce System Requirements

➢ **1. Start initialization:**

System: Fade in to a text page using the standard Crescent template for text pages. Include the following screen text, fading in each bullet item as it is introduced with the voiceover:

- **Page Title:** Salesforce System Requirements

- **Bullet Items:**

    - You must have an Internet connection.

    - You must have a Web browser:

        o Salesforce works with standard Web browsers such as Microsoft Internet Explorer and Mozilla Firefox

        o Internet Explorer is the corporate standard at Crescent

    - JavaScript must be enabled in your Web browser.

    - Contact the Help Desk if you have any problems:

        o Type **`helpdesk`** in your Web browser.

➢ **2. Voiceover:**

Voice: Salesforce is a Web-based application, so you must have an Internet connection and a Web browser to use the application.

Voice: Salesforce works with standard Web browsers such as Microsoft Internet Explorer and Mozilla Firefox. However, the corporate standard at Crescent is Internet Explorer.

Voice: You must also have JavaScript enabled in your Web browser. Since JavaScript is usually enabled by default, you should only have to enable it if you have previously disabled it.

Voice: If you don't think you meet these system requirements, or if you have questions about them, contact the Help Desk. You can access the Help Desk through your Web browser by entering helpdesk...one word...in your Web browser's address box. You must first be connected to the Crescent network.

> **Voice:** Let's now look at how you access the Salesforce login page.

> ➤ **3. Action:**

> **System:** Wait briefly and then continue to the next scene.

Scene 3: Accessing the Salesforce Site

> ➤ **1. Scene initialization:**

> **System:** Fade in to a screen with Internet Explorer open with CHIP or the Crescent Web site loaded as the Web site.

> ➤ **2. Voiceover:**

> **Voice:** To access Salesforce, open your Web browser and go to https://login.salesforce.com.

> ➤ **3. Action:**

> **System:** Show a text box directed at the Web browser URL box. Include the following text:

> • **Text Box:** The Salesforce URL is https://login.salesforce.com.

> ➤ **4. Action:**

> **System:** Type `https://login.salesforce.com` in the Web browser URL box and go to the Web site. When the Web site opens, continue to the next scene.

Scene 4: Bookmarking the Site for Future Use

> ➤ **1. Scene initialization:**

> **System:** Continue from the previous scene with the Salesforce login page open.

> ➤ **2. Voiceover:**

> **Voice:** To make accessing the login page easier in the future, you can save it as a favorite in your Web browser or create a bookmark to it on your desktop.

> **Voice:** To save it as a favorite in your Web browser, click the Web browser's "Add to Favorites" button followed the "Add to Favorites" menu item. Note that this

button and menu could be different in your Web browser, depending on which version you have.

➢ **3. Action:**

System: In sync with the voiceover, click the **Add to Favorites** button followed by the **Add to Favorites** menu item. This opens the **Add a Favorite** popup in the Web browser.

➢ **4. Voiceover:**

Voice: Click the "Add" button to add the page as a favorite.

➢ **5. Action:**

System: In sync with the voiceover, click the **Add** button.

➢ **6. Voiceover:**

Voice: You can now click the "Favorites" button to quickly access the login page.

➢ **7. Action:**

System: Near the end of the voiceover, click the **Favorites** button and then click the new link in the favorites list.

➢ **8. Voiceover:**

Voice: You can also create a bookmark on your desktop to quickly access the Salesforce login page when your Web browser is not yet open.

➢ **9. Action:**

System: Resize the browser window to show browser and left side of desktop.

➢ **10. Start voiceover:**

Voice: Simply drag the Web address icon from your Web browser to your desktop.

➢ **11. Action:**

System: In sync with the voiceover, drag the URL icon to the desktop.

➢ **12. Start voiceover:**

Voice: Then you can double click the bookmark to open your Web browser and immediately go to the login page.

➢ **13. Action:**

System: In sync with the voiceover, double click the icon to open the login page in the browser. When the Web site opens, continue to the next scene.

> 💬 **Tip** This may be a good time to clean up any additional browser windows that may be opened.

Scene 5: Salesforce Login Credentials and Process

➢ **1. Scene initialization:**

System: Continue from the previous scene with the Salesforce login page open.

> ⓘ **Note** The login page must not have the **User Name** box pre-populated, and the **Remember User Name** checkbox must not be selected.

➢ **2. Voiceover:**

Voice: To log in to Salesforce, you must have a user name and password. If you do not know your user name and password, contact the Help Desk. Typically, your user name will be your Crescent email address.

Voice: When you are first assigned an account in Salesforce, the system automatically sends you information to perform your first login. During this first login, you are required to set your password.

Voice: To login, type your user name and password.

➢ **3. Action:**

System: Type a legitimate user name in the **User Name** box.

System: Type a legitimate password in the **Password** box.

➢ **4. Voiceover:**

Voice: You can select the "Remember User Name" checkbox if you want your user name to automatically appear in the "User Name" box the next time you

access the login page. If you select this option, you will still be required to provide your password.

➢ **5. Action:**

System: Select the **Remember User Name** checkbox.

➢ **6. Voiceover:**

Voice: Once you have entered your information, click the "Login" button or press "Enter" on your keyboard to log in to Salesforce.

➢ **7. Action:**

System: Click the **Login** button. When the Salesforce home page opens, continue to the next scene.

Scene 6: Accessing Applications in Salesforce

➢ **1. Scene initialization:**

System: Continue from the previous scene with the Salesforce home page open.

➢ **2. Voiceover:**

Voice: When you are logged in to Salesforce you can access specific applications such as Crescent's Content area, Ideas, or a PharmForce module.

Voice: These applications are available in the "force.com apps" selection box.

➢ **3. Action:**

System: Click the dropdown arrow of the **force.com apps** selection box to show the available items in the list.

➢ **4. Voiceover:**

Voice: Simply select an application in the list to open that application.

➢ **5. Action:**

System: Select the **Ideas** selection box (or any other application that most Crescent users would have access to).

➢ **6. Voiceover:**

> **Voice:** Depending on the application and the tabs you have set to open by default, you may have to click a tab to select a specific area within the application.

> ➢ **7. Action:**

> **System:** Select a tab within the application. Allow the application tab to open, wait briefly, and then continue to the next scene.

Scene 7: Conclusion

> ➢ **1. Scene initialization:**

> | |
> |---|
> | ⓘ **Note** There is no quiz for this tutorial. |

> **System:** Fade in to the conclusion page using the standard Crescent template for conclusion pages. Include the following screen text:

> • **Title:** This concludes the *Accessing and Logging in to Salesforce* tutorial.

> ➢ **2. Voiceover:**

> **Voice:** This concludes the Crescent Healthcare tutorial, "Accessing and Logging in to Salesforce."

> ➢ **3. Action:**

> **User:** Close tutorial window.