# ITGlue

How to Master
IT Documentation

Introduction

Treat IT documentation with the seriousness it deserves and it will reward you. It's as simple as that.

In the short run, you will see improvements in Resolution Time and Average Handle Time, while in the long run, it will help you retain more customers and reduce costs, among other things.

To get there, however, you need to build strong foundations. You must have a comprehensive documentation plan in place, set up effective processes to document entire IT environments and build a strong documentation culture in your organization. We cover each of these steps in great detail in this eBook.

Let's get started.
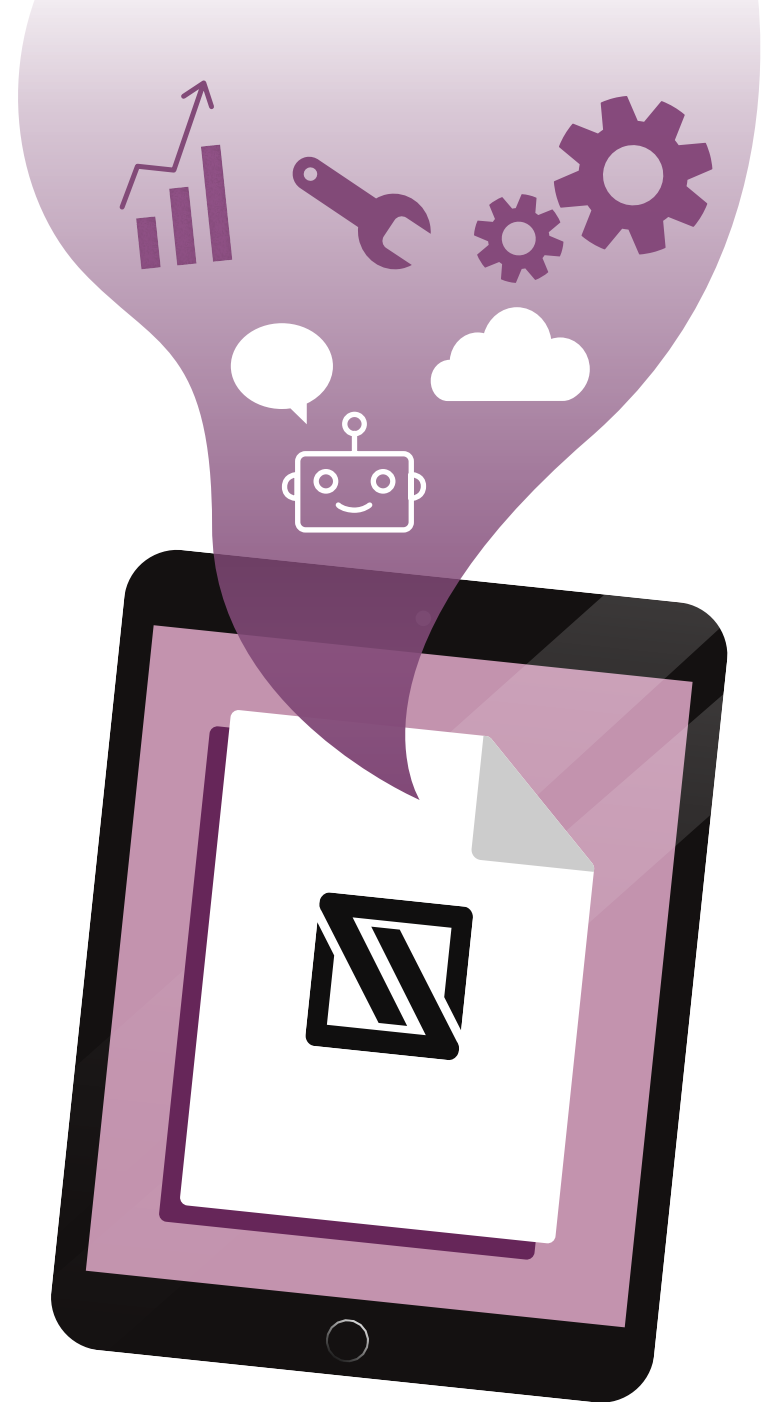
Chapter 1:

Building a Documentation Plan & Collaboration

If your team is not aware of what to document, each person may end up doing things their way, resulting in inconsistency and unpredictability. This is why you need to build a documentation plan.

While each MSP or internal IT team is different, there are certain best practices that apply to all and sundry based on the usage patterns we've seen. This should help you create a documentation plan that suits your own needs.
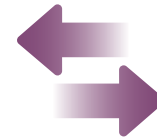
Keep Internal and External Documentation Separate

Documentation that you use internally should not be mixed in with external or customer-specific documentation.

Create a Dedicated Folder for Drafts or Unfiled Documents

Set up a dedicated folder called the Inbox to hold your drafts or un-filed documents. The aim behind this is to encourage your team to get started on documentation projects and to ensure visibility regarding the workflow of documentation.

Designate One Person as a Taxonomist

Many MSPs have one person (taxonomist) who can move the documentation around, putting it into the right place and making sure that incomplete documentation gets completed. This helps you keep the root folder structure clean.

Set Up an Internal Knowledge Base

This will allow your team to learn new technologies faster, standardize the way you deliver service and dramatically reduce the amount of shoulder-tapping and wasted time. This section should include all the mission-critical documentation required to support your customers (including information synced from your PSA, RMM, BDR, etc.).

Tip: Once you've organized this section properly, be sure to cull outdated information.

Create an External Knowledge Base

You can use this section to store SOPs that you share with your customers, such as "How to access our IT support group after hours." We recommend using MyGlue for this, our secure, easy-to-use hub for storing and sharing key operating procedures. But if your customers are hands-on (i.e., if they have an in-house IT person), you might benefit from collaborating via IT Glue instead.

Standardize Internal Processes With SOPs

In most MSPs, if you ask techs how they perform a standard process, chances are they will each have a slightly different answer. Documenting your SOPs and making them centrally accessible prevents this from happening. It will help you standardize service delivery and ensure high-quality service every single time.

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Build External or Customer-Specific Documentation

Customer-specific documentation is an essential part of delivering quality IT services. The structure developed here is relatively straightforward but allows for a simplified and standardized means of accessing IT documentation. Here's the breakdown:

- Inbox – for incomplete documentation.

- Administration – for purely administrative documentation like service agreements, licensing, etc.

- Knowledge Base – for specific technologies used by each company, including industry-specific applications and legacy stack elements.

- SOPs – for procedures specific to each client like "Disabling the security code at Location X" or "How to Install a Workstation at Acme's New York location."

- Projects – for active and archived project documentation, which may be helpful in providing support in the future.

- Strategy – to store strategic IT documentation such as QBR reviews, account management information and road maps.

- Assets – consists of information you need to know about every customer and every location in order to deliver IT support effectively.

BONUS TIP:

IT Glue provides standardized templates for core assets and allows you to create your own for flexible assets. This way, a technician can log into an environment they've never seen before and be immediately productive.

Chapter 2:

How to Kickstart Your Documentation Efforts

As we saw in the first chapter, there is a lot that needs to be documented, which can be quite overwhelming. The question is, where do you start? Well, to begin with, think about the areas where documentation adds the most significant value. Typically, IT Glue partners gain the most ROI from two things: automated documentation and documenting routine information.

The logic is simple — this mostly covers information that your team uses on a daily basis. Consequently, your team will locate the right piece of information faster and make processes easily repeatable. Use this step-by-step framework to get started.
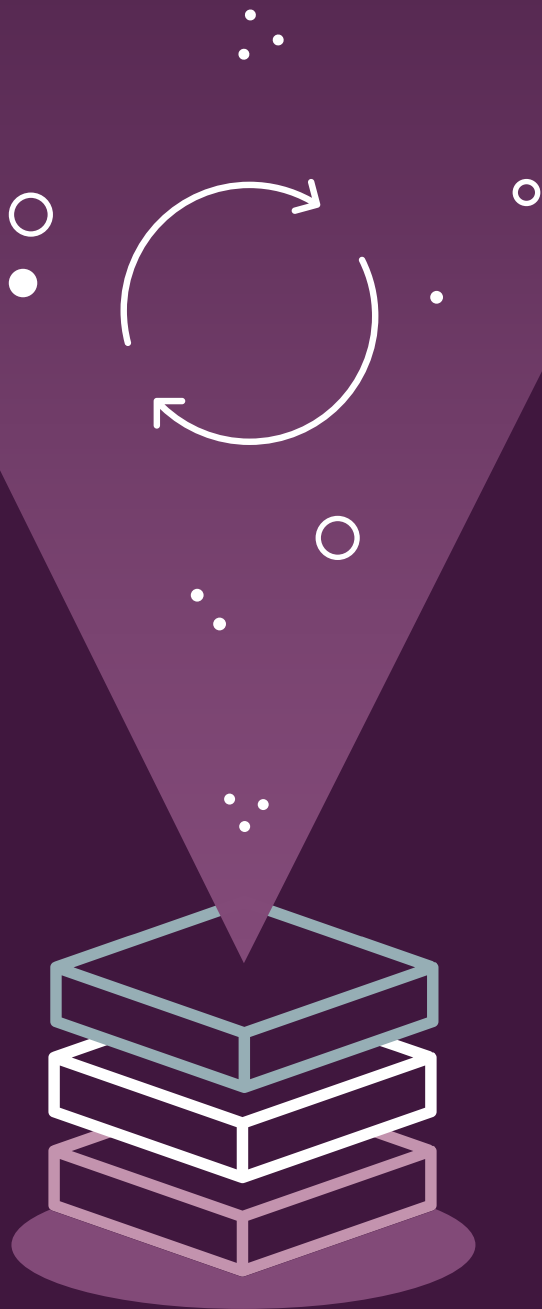
1. Automate and Grab What You Can From the Tech Stack

Before your team starts to document, use integrations and automation to grab relevant information from your tech stack. If you are an IT Glue partner, we suggest you begin by syncing your PSA. But ensure you clean the data (culling obsolete records, etc.) in your PSA before syncing to IT Glue.

Once that is complete, then it is time to sync your RMM. Now, if you have information stored elsewhere, you might want to consider leveraging our API to build an integration. This is especially powerful for flexible assets that you have customized to align with your unique operational needs.

If you aren't currently using a PSA, don't worry. We've recently introduced a new tool for seamless PSA onboarding. Alternately, you could still use the more painful method of uploading spreadsheets, making manual entries or using your RMM as a starting point and then augmenting that information manually.

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2. Document SOPs Related to the Most Common Tasks

Focus your efforts on documenting SOPs and building up a knowledge base around the most common tasks. Think about it this way; your investment is the five minutes you take to write an SOP or import it from Word to IT Glue. And the return on it is the time your team saves by having that SOP at their fingertips.

Think about it. If your team can shave a minute off a routine task that occurs ten times a day, you will breakeven right away on the first day. By contrast, it might take a month to document a non-routine task to pay for itself.
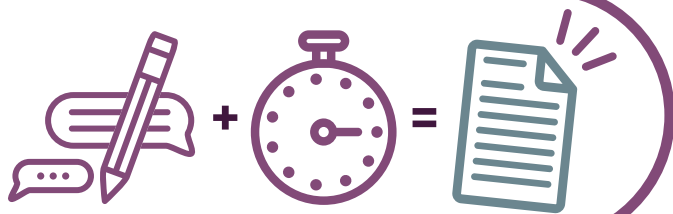
3. Document the Network Environment

Physically documenting network environments is challenging in the present circumstances. Instead, use Network Glue, our new automatic network discovery, documentation and diagramming tool, to do the same.

When Network Glue is deployed, it immediately pulls a client's network information into IT Glue, capturing a complete picture that eliminates blind spots. Best of all, it automatically syncs to include updates to the network.

You can also use our integration with Auvik or input diagrams drawn in Lucidchart if those methods are preferred. Besides that, we also integrate with Rapidfire Tools' Network Detective, which lets you perform network and security assessments.

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5. Fill Information Gaps

Once you are up and running, the next step is to spot missing information. You can use our Completion Profile feature to get a birds-eye view of what has and hasn't been completed. It enables you to plug information gaps rapidly.

4. Document the More Complicated Tasks

Since they take more time, complex tasks must be dealt with at the end. This way, your team's progress won't be hindered and they will be able to realize the value of documentation quickly.

Complicated tasks may not be the most common but you can save a lot of time when they are documented. Besides reducing time wastage, it allows you to minimize errors as well. You might experience 80 or 90 percent time savings on some of the more complex tasks.

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Chapter 3:

Process Documentation and Diagramming

Let's say you have kicked off your documentation efforts and everyone on your team is on the same page, making an active effort to document more. But then you realize that some of the documents are incomprehensible and only the person who wrote them is able to understand them.

You can't expect your team to be great at process writing. There's a reason why technical writing is a profession unto itself. What you can do, however, is implement guidelines for process writing and diagramming.

Process Writing Guidelines

Getting your team to follow these basic guidelines should improve the quality of your process documentation almost immediately.

- Describe the process from the very beginning to the very end and use a line chart to conceptualize the steps.

- Avoid lengthy introductions. Instead, state the purpose, the end objective, the number of steps involved, and if needed, how it is different from a similar process.

- Break down processes into a series of steps and use numbers, bullets or phrases such as *first of all*, *next* and *finally* for easier comprehension.

- Each action should be associated with a single point in the sequence. Be sure to write even the obvious ones.

- Limit yourself to describing process elements — avoid editorializing and keep your writing crisp and simple.

- Contingencies should be given their own sentences, located after the previous step, and should be written as "if x, then y."

- Write in active voice because the process document is a "how-to" — you need to write it like you were giving instructions to somebody.

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Process Diagramming Guidelines

Let's be honest. Some processes are just easier to visualize. Sometimes a wall of text can be tedious and incomprehensible but a diagram is crystal clear. Here are few basic guidelines to keep in mind:

- There are many diagram shapes. Familiarize yourself with them and use the right one at the right time.

- Use symbols to denote different types of steps. The ASME symbols, designed by the American Society of Mechanical Engineers, can be used. Choose whatever symbols work best but be consistent in which one you use.

- Determine the scope and objective of the process ahead of time.

- Brainstorm the different steps ahead of time. A process diagram is not usually something you bang out quickly – it has to be thought through thoroughly.

- Break each process into steps. Include each step on the diagram. Skipping steps leads to confusion.

- Show connections, sequences and decisions.

- Show the entire process from beginning to end.

- Use the right tool for the job. IT Glue is integrated with Lucidchart, which is cost-effective.

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Chapter 4:

How to Maintain Great IT Documentation

Great IT documentation is a beautiful thing. You save a lot of time, and more importantly, a lot of headaches. But you must take the time to keep it clean and up to date. Otherwise, it will defeat the very purpose of documentation. Here are some ways to keep your IT documentation in top shape.

Build a "When You See Something, Do Something" Mentality

Start by setting clear expectations that documentation is a team responsibility. Ensure the people you trust have access to edit the documentation, and if they don't, make sure they know how to escalate it and get changes made.

Process changes happen — technology changes and people find better ways to solve problems. Just make sure that when changes happen in the real world, they reflect in your documentation as well.

Use Flags to Draw Attention

The "flags" feature in IT Glue can be used to call attention to documents that require updating. For instance, if you changed a part of your stack, you will have to ensure this is reflected in relevant documents. To ensure this happens, you can raise a Tier 1 Flag to draw a senior tech's attention.
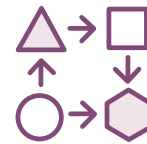
Gamify Documentation

Gamifying documentation helps in building a proactive documentation culture in your organization. It gives more incentive to your employees to interact or keep the documentation up to date.

To get started, you can activate the IT Glue-CrewHu integration, which allows you to monitor metrics, such as Documents Viewed, Documents Deleted and Documents Updated, and reward or recognize employees who perform well.

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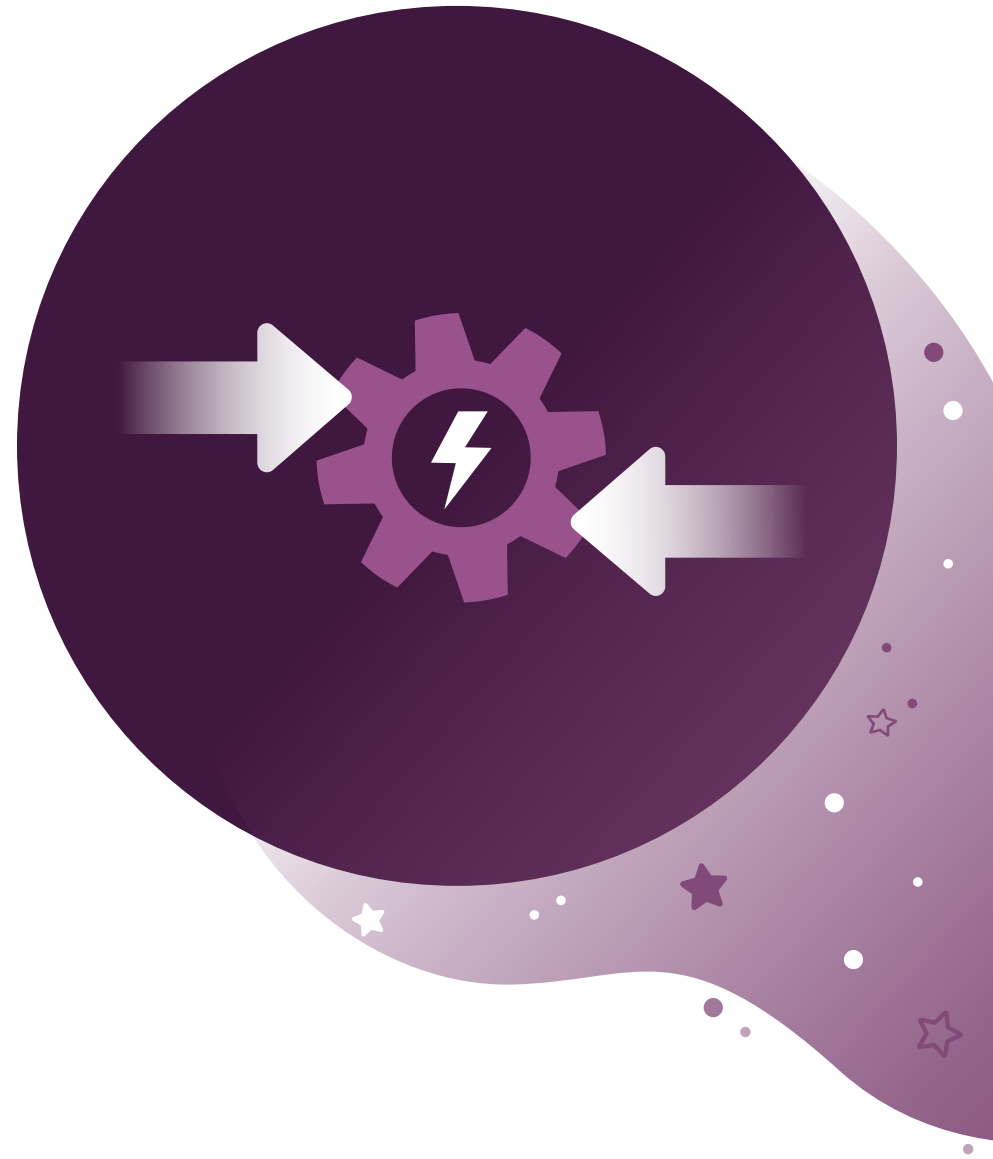
Set Workflow Triggers

Workflow triggers can be set to alert your team to documentation that needs to be created, updated or approved. This is a great way to maintain documentation hygiene and it gives you a fair bit of flexibility with regards to how you want to set them up.

Establish a Regular Cadence

It's easy to get caught up with your day-to-day work, fighting fires and whatnot. But time spent on documentation isn't time lost into the ether. It's an investment in your future productivity. Make sure there's a regular cadence — weekly, monthly, quarterly — to go through your most important documentation, even if it's just to flag items to revisit later.

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Conclusion

Mastering IT documentation is hard work. But MSPs and internal teams can't afford to put it on the back burner anymore. The competitive advantage it offers, when leveraged fully, is there for everyone to see.

While the importance of your documentation might feel overwhelming, IT Glue offers you everything necessary to maximize your information's efficiency, accessibility and security. As a central hub for all of your data and processes with customizable accessibility for all of your staff, using IT Glue for your documentation practices will lead you to documentation mastery.

To learn more, we invite you to invest a few minutes in a quick demo.

GET A DEMO TODAY!

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