- Add the user name, snow ticket and date of provisioning to the table below for tracking and removal
- Respond to the ticket letting user know the <insert custom quality gate/profile> has been created and advising them to finish their customization in 10 business days
- Close the ticket

Reference:

Standard Answer:
Initial response

Hello <user>.

Requests for custom quality gate / quality profile must be accompanied by LTO approval. The approving LTO should match the AppCat id information. Please also provide a name for the new custom quality gate/profile.

Thanks you,

Completion confirmation

Hello <user>,

Please note that custom quality gate/profile: <insert quality gate/profile name> has been created and you've been granted modify permission. You have 10 business days to complete the necessary modifications after which the permissions will be revoked.

Thank you,

User name	ServiceNow ticket #	Date of provisioning	Date of removal

Internal Management

This section covers standard procedure for tasks that are performed under certain requirements/conditions. They are categorized based on the application.

Confluence: Managing document lifecycle in public spaces

Confluence: Managing document lifecycle in public spaces

Description:
To manage the lifecycle of documents in public confluence spaces

Procedure:
This procedure explains how to manage document lifecycle by undergoing content review and updating Confluence documents for accuracy and relevancy at regular intervals.

Follow the steps below to implement this request-

Step 1: Document Identification:

This process comprises of filtering out those pages in public confluence spaces which have not been updated in last 6 months. This step will be done by the documentation team. The steps for identifying stale documents are as following:

1. Login to Confluence.
2. Search for *"Advanced Search"* in the search bar on the top of Confluence page.
3. Set the parameters as following in the left side options, like:
   ```
   In Space = "Enterprise DevOps Tools"
   Last Modified > Custom > To = <enter date six months before>
   Of Type = Pages
   ```
4. For additional parameter, click **Add Filter**.
   Select additional filter as below:
   ```
   with parent = <tool name> - Document Type
   ```
   For example,
   "with parent = Jira - Knowledge Base" will give Jira tool's knowledge base documents.

For fetching FAQ documents, only use `with parent = FAQs` without mentioning any tool name.

The list of pages generated from the above steps is the target list for review.

Step 2: Content Review:

DTS tickets will be assigned to the appropriate stakeholders (tech leads) to review the stale content for accuracy and relevancy and mark which portions/sections require an update. The reviewer should put up inline comments on the Confluence page itself so that technical writers can work on its updation.
The summary/title of the DTS ticket should be:
`Space Name: Page Update Required - <Title of page>`

While creating the DTS ticket, make sure it has valid document URL in the description and after the review is completed the assignee should mention their feedback/write *"no updates"* in the document's comments section.

Step 3: Content Updation

A technical writer will be assigned a DTS ticket to update the content as per feedback of tech leads in the content review step. After making the required changes and getting them approved by the final sign-off approver, the page will be marked as up to date by adding the below details in the content updation DTS ticket comments.

> *Title of Page*
> *URL*
> *Review Date*
> *Final Approver*
> *Up to date- (or X)*
> *Follow up- DTS Ticket number (if available for content review step)*

Confluence: Creating new page using template

Confluence: Creating new page using template

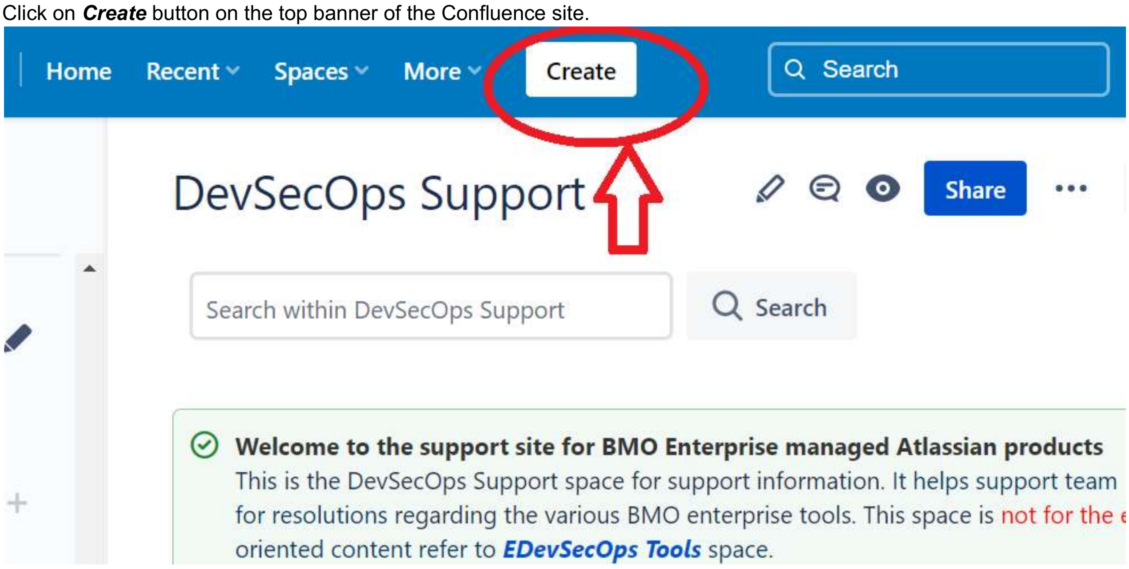
Description:
To create a new page in Confluence using a standard template

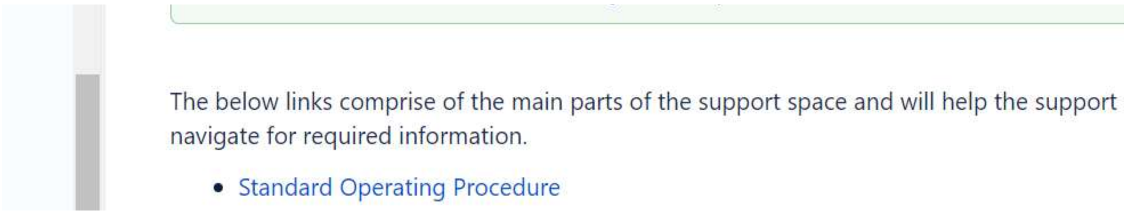
Procedure:
Using templates helps in document standardization and speeds up the documentation process. The below process guides you on creating a new page in Confluence by making use of pre-defined templates for specific documentation needs like routine tasks and issues/tickets.

Page templates can be only used when adding a new page, it is not possible to apply it to an already-existing page.

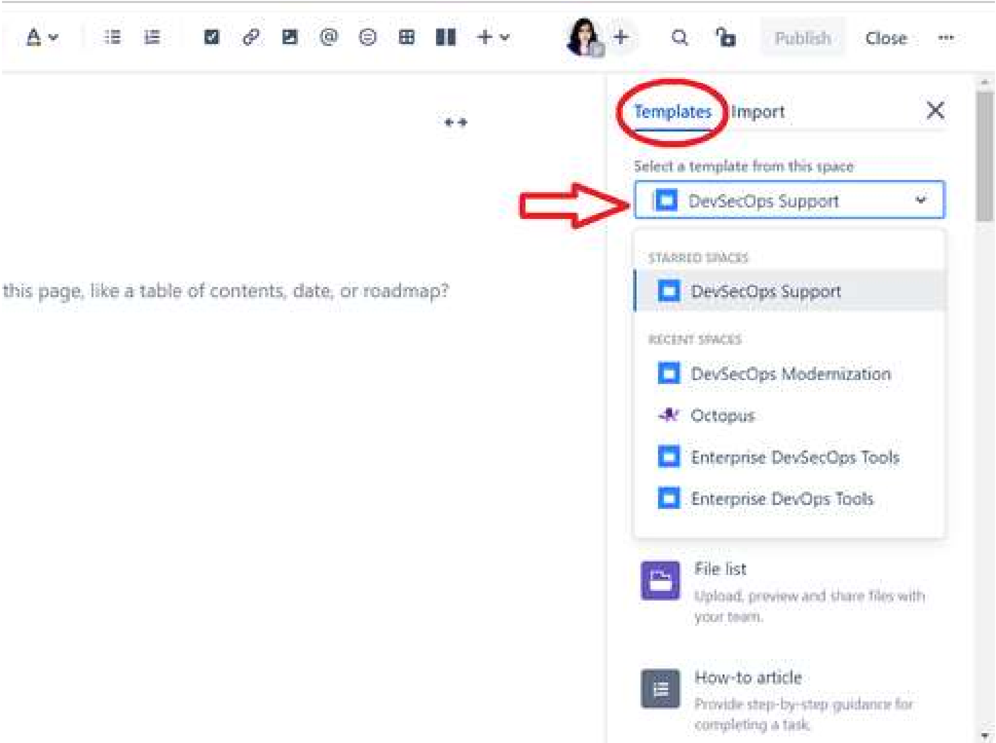
Follow the steps below to implement this request-

1. Click on ***Create*** button on the top banner of the Confluence site.

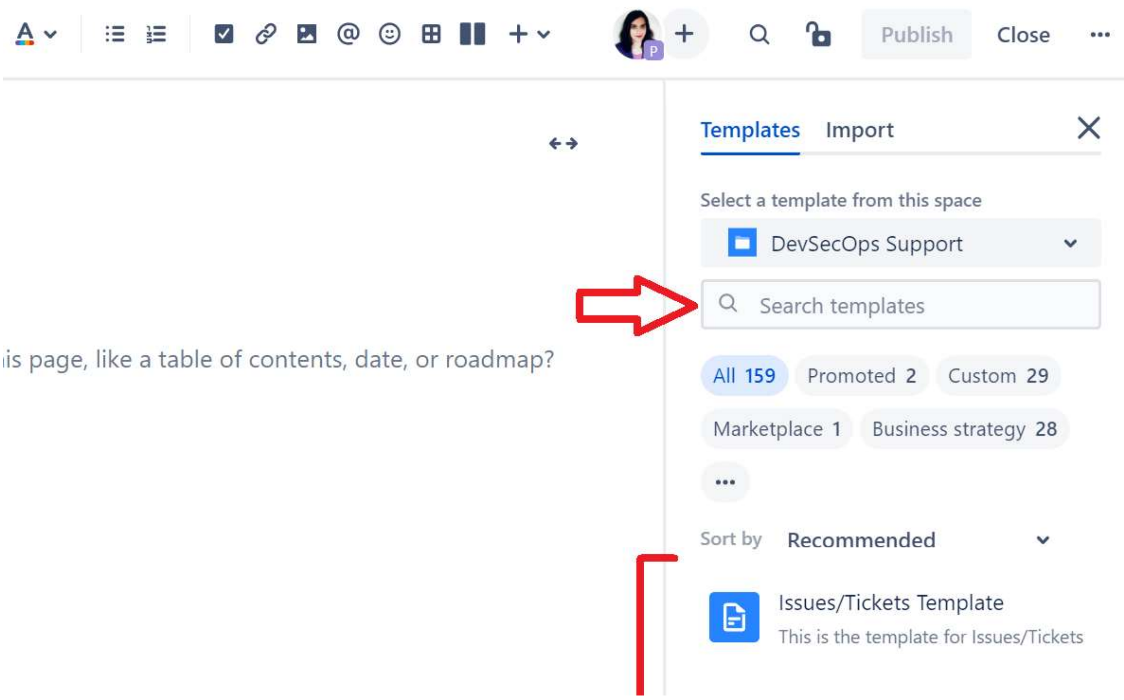


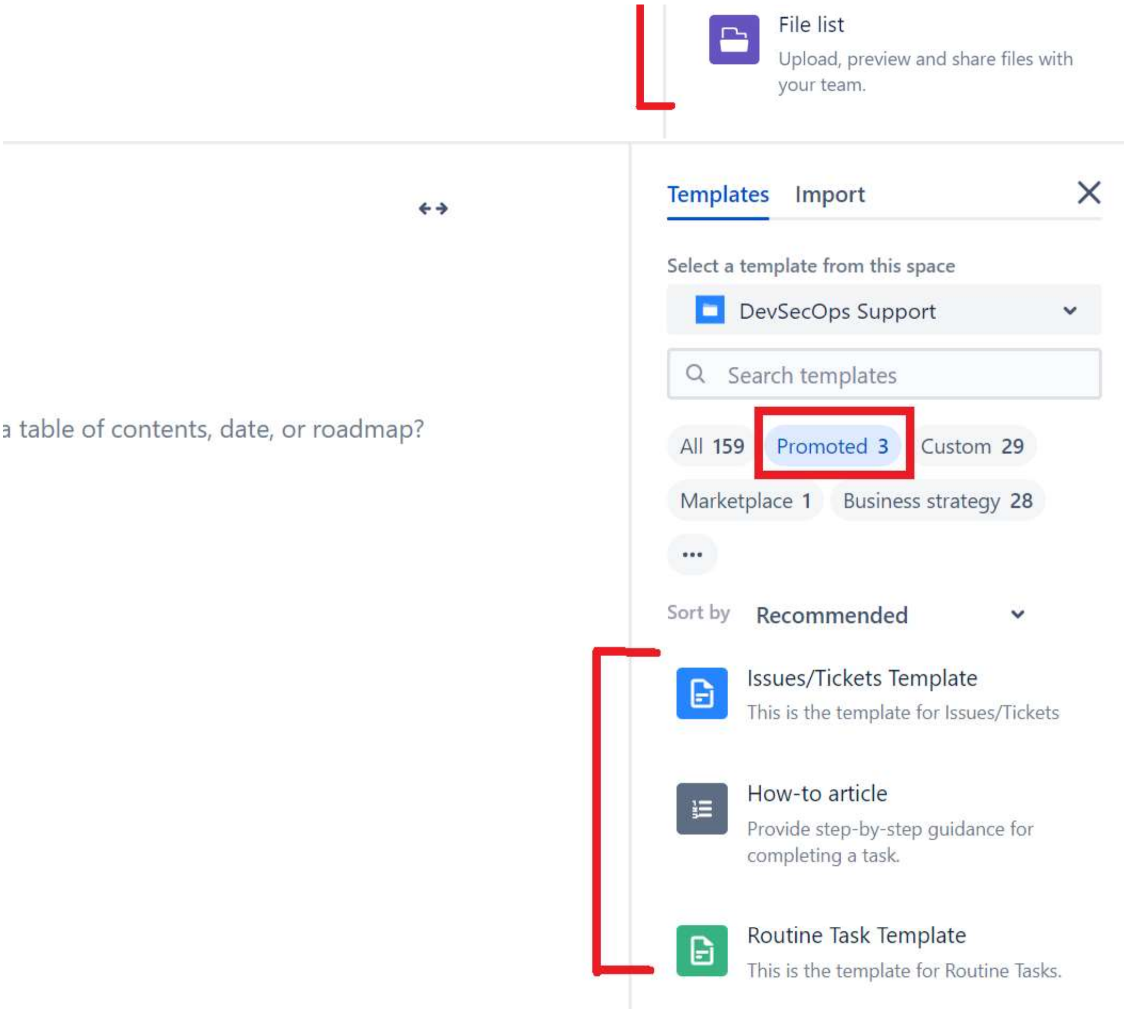


2. A new page will open, on the right-hand side there will be a panel. Select ***Templates*** option in the panel and select the space from where you want to use the template in the drop-down list.

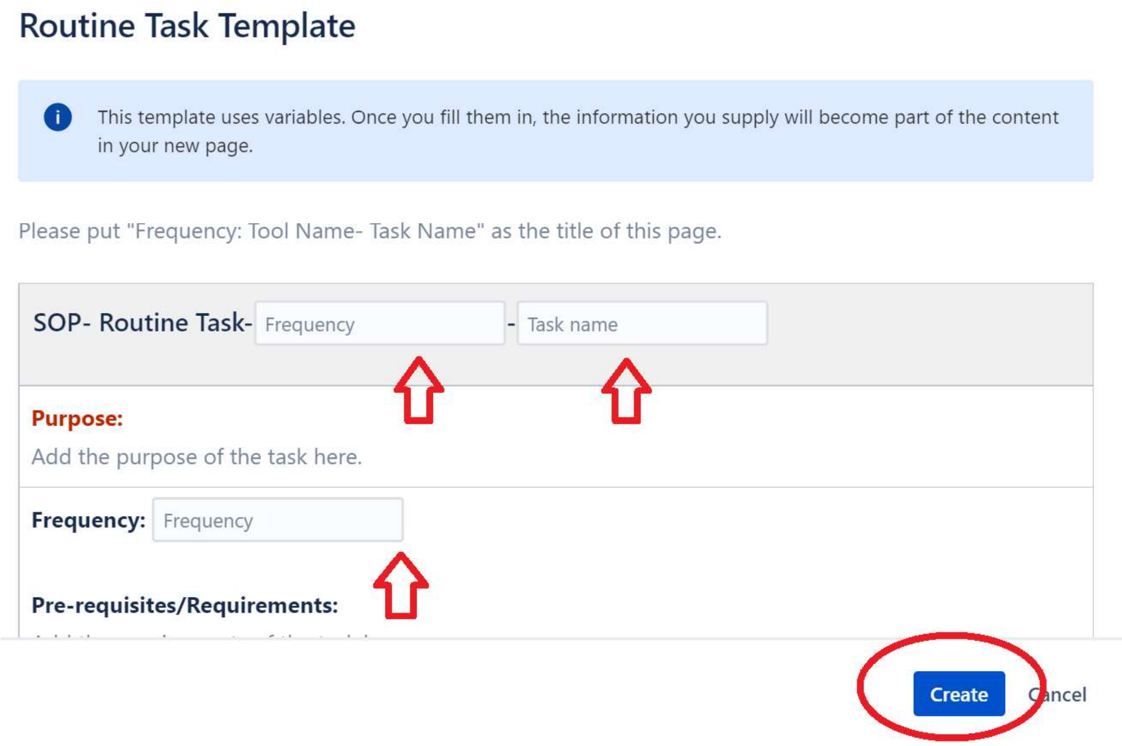


3. The available templates will be listed down, you can scroll through the list of available templates. If you know the template name, then you can search it in the search bar. Click on the template name which you want to use for creating document.
Note: Usually, the template names are same as the document type you are wanting to create. You can also click on ***Promoted*** button to view the most commonly used templates.





4. A template form will open where you can fill in document-related information in the template like frequency, task name etc. Then, click ***Create*** button.



5. The template will be loaded in your document. You can replace the placeholder text will the relevant content which you want to add to the document.
6. Give title to the page as per suggestion given in the first line of template and click ***Publish*** button on the top right of the page.

Confluence: Publish documents in Comala workflow-enabled workspaces

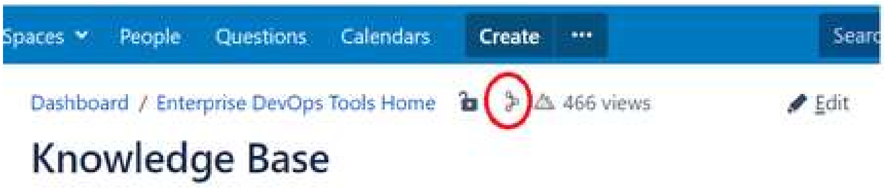
Confluence: Publish documents in Comala workflow-enabled workspaces

Description:
To publish documents according to the Comala workflow in public spaces

Procedure:
This document guides user/contributor on the process to be followed when publishing document to any public-facing space in Confluence which has Comala workflow in place.

Follow the steps below to implement this request-

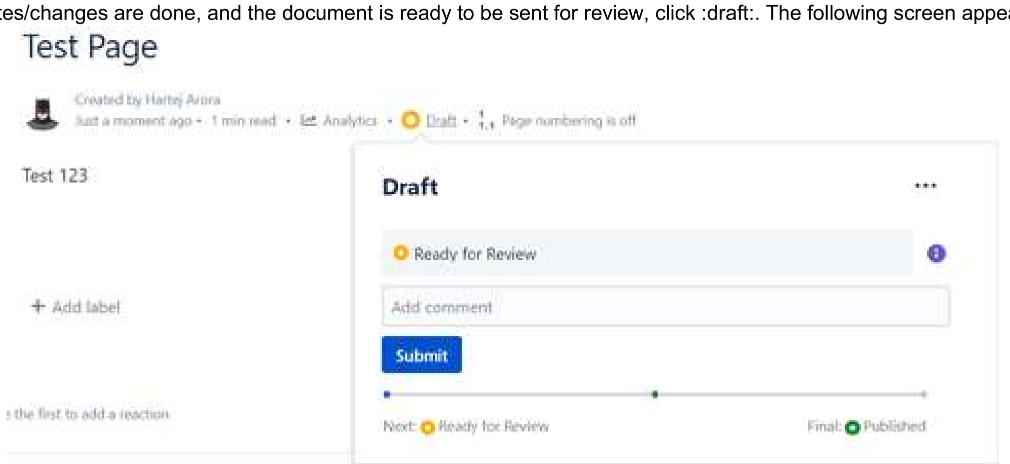
To identify the space-specific workflows, the contributor needs to select the three-dot icon (marked in red), at the top of every page. For example, the basic Knowledge Base Review workflow in all the spaces is as shown below, the only difference in Knowledge Base Review workflow of every space will be in the list of reviewers assigned.



When a contributor updates/creates a new document, it goes through three levels in the workflow to be published. The three stages are:

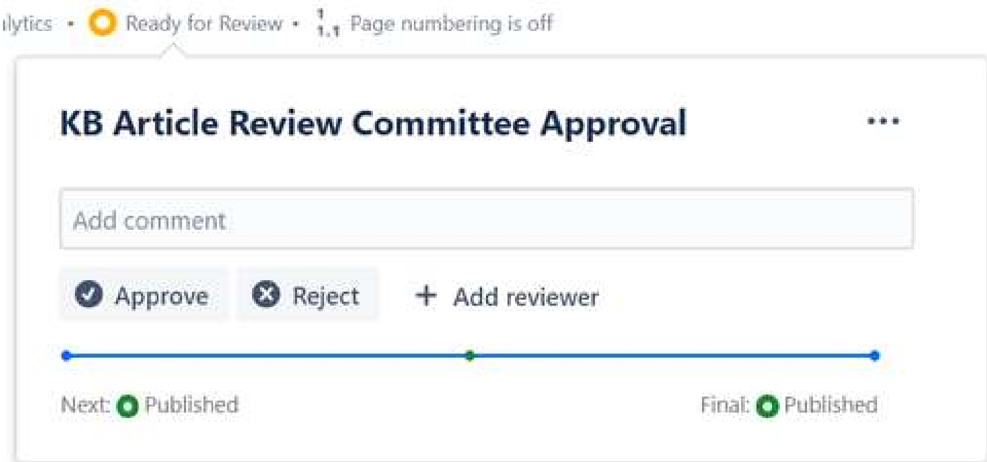
- Draft
- Ready for Review
- Published.

1. A page that is being added or updated is initially tagged as a *Draft*. The contributor creates the draft document and sends it for review. Before sending the draft for review, please go through the attached document in the reference section below to understand the categories and types of documents and the labels associated.
2. After the updates/changes are done, and the document is ready to be sent for review, click :draft:. The following screen appears:



You can also choose to show the workflow, as shown below:

3. Click **Submit** button and the status of the document will change to *Ready for Review.*



4. To choose reviewer(s), click on **+Add reviewer.**
5. Check the boxes for all the members of the Knowledge Base Article Review Committee that you want to add as reviewers. There needs to be at least 1 reviewer chosen to review the updates.
6. The corresponding reviewer can choose to approve or reject the update. If all the reviewer(s*) accept update*, it is sent to the next stage. The reviewer(s) can also *reject update(s),* in which case the page is sent back to the contributor. The reviewer can also reach out to provide feedback for the rejection.
7. After the reviewer approves the update, the status is changed to *published*.
   Important:
   - In case of external publications, it is mandatory to seek review approval from Platform owners/authorized delegates.
   - In case of internal publications, review approval from Platform leads is sufficient.
8. The pages with:published: status can now be viewed by authorized/permitted viewers. Any further update to the published page will revert its status back to :draft:mode, but last published version which was approved will stay available for readers to read.

If the pages are in draft mode/pending approvals, then the viewers/users with read-only access cannot see them. Until all the updates are approved, and the changes are published, the viewers can only see the last published version of the page.

References

Please refer to the attached document to understand the spaces, document types and the associated labels/tags which can be helpful in publishing the documents appropriately.

Space description...nd labels (1).pdf

General: Request access to QA domain

General: Request access to QA domain

Description:
To request access to QA domain

Procedure:
The procedure includes multiple steps:

1. User needs to submit a request form to ADS Planning.
2. User needs to create an email/mailbox in QA.
3. User needs to submit a request for QA M365 license.
4. User tries to access the server in QA domain.

Follow the steps below to implement this request-

1. To submit a request to ADS Planning, fill out the ADS planning request form with following details like:
   a. Requestor Name/Email
   b. Project Name
   c. Requestor Department/LOB
   d. Clarity code#
   e. Information required for account creation.

ADSPlanning_Re...orm_V1-61.xlsm

2. After filling out the form submit it to ADSPlanning@bmo.com.