### **Purpose**

The purpose of this plan is to identify the document management team, Consumer Financial Protection Bureau (CFPB) requirements, lifecycle of documents, and ServiceNow (SN) Knowledge Base (KB) publication and backlog management work instructions (WI).

### Team

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | Email | |
| COR/Sr Infrastructure Service Desk Specialist | Cathy Hurkamp | | catherine.hurkamp@cfpb.gov |
| Technical Writer (TW) | Dany Garcia | | dany.garcia@cfpb.gov |
| Program Manager (PM) | Rafael Samuels | | rafael.samuels@cfpb.gov |
| Customer Service Analyst (CSA) | Rachel Chen | | hong.chen@cfpb.gov |
| Customer Service Analyst (CSA) | Ricardo Lindo | | ricardo.lindo@cfpb.gov |
| Technical Trainer (TT) | Nelly Casseus | | nelly.casseus@cfpb.gov |

## **Notes:**

**Topic:** Describe topic that must be addressed and by whom

**Roadblocks:** Describe roadblock that must be addressed and by whom

**Action Items:** Describe action item that must be completed and by whom

**Topic: Describe topic**

* List any additional topics that must be addressed and by whom

**Roadblocks: Describe roadblock**

* List any roadblocks that must be addressed and by whom

**Action Items: Describe action item**

* List any action items that must be completed and by whom

### Document Management Lifecycle

### Document implementation cycle contains five stages with varying but integrated tasks.

A picture containing compact disk, electronics

Description automatically generated

**Discovery:** Artifacts are identified through dashboards filters/reports and requests for creating, updating, archiving, or deleting documents.

**Capture:** Knowledge the Bureau currently possesses, (held by individual employees, teams, documents, or processes) must be recorded through communication efforts with Subject Matter Experts (SMEs), document owners, Service Desk Technicians (SDTs), and management.

**Organization:** The classification, categorization, and indexing of information. Knowledge organization enables easy retrieval, navigation, use and sharing of information among employees and teams.

**Assessment:** Tasks such as priority, status, timeline, and next steps are established.

**Design:** Create templates to deliver content that is appealing, meets business requirements, and adapts to CFPB brand, for effective communication on multiple browsers and platforms to ensure a seamless interaction between audience and content.

**Development:** Applying **Design** standards, the appropriate format(s) to the document are utilized, however, is fluid and able to be changed as needed.

**Proofreading:** This includes but is not limited to updating a Word draft, proofread for spelling and grammatical errors, manage links and update screenshots as needed.

**Review & Publish:** Collect feedback from team, validate the document is ready for publication.

**Implement:** Tracking how often the article is viewed, utilized, and audience retention of message.

### Stages Tracking:

### Discovery & Capture

|  |  |  |
| --- | --- | --- |
| ID Number | Group | Description |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Timeline

|  |  |  |
| --- | --- | --- |
| ID Number | Status | Comments |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## **Notes:**

**Topic:** Describe topic that must be addressed and by whom

**Roadblocks:** Describe roadblock that must be addressed and by whom

**Action Items:** Describe action item that must be completed and by whom

**Topic: Describe topic**

* List any additional topics that must be addressed and by whom

**Roadblocks: Describe roadblock**

* List any roadblocks that must be addressed and by whom

**Action Items: Describe action item**

## List any action items that must be completed and by whom

### Organization and Assessment

|  |  |  |
| --- | --- | --- |
| ID Number | Group | Description |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Timeline

|  |  |  |
| --- | --- | --- |
| ID Number | Status | Comments |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## **Notes:**

**Topic:** Describe topic that must be addressed and by whom

**Roadblocks:** Describe roadblock that must be addressed and by whom

**Action Items:** Describe action item that must be completed and by whom

**Topic: Describe topic**

* List any additional topics that must be addressed and by whom

**Roadblocks: Describe roadblock**

* List any roadblocks that must be addressed and by whom

**Action Items: Describe action item**

List any action items that must be completed and by whom

### Design and Development

|  |  |  |
| --- | --- | --- |
| ID Number | Group | Description |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Timeline

|  |  |  |
| --- | --- | --- |
| ID Number | Status | Comments |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## **Notes:**

**Topic:** Describe topic that must be addressed and by whom

**Roadblocks:** Describe roadblock that must be addressed and by whom

**Action Items:** Describe action item that must be completed and by whom

**Topic: Describe topic**

* List any additional topics that must be addressed and by whom

**Roadblocks: Describe roadblock**

* List any roadblocks that must be addressed and by whom

**Action Items: Describe action item**

List any action items that must be completed and by whom

### Proofreading

|  |  |  |
| --- | --- | --- |
| ID Number | Group | Description |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Timeline

|  |  |  |
| --- | --- | --- |
| ID Number | Status | Comments |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## **Notes:**

**Topic:** Describe topic that must be addressed and by whom

**Roadblocks:** Describe roadblock that must be addressed and by whom

**Action Items:** Describe action item that must be completed and by whom

**Topic: Describe topic**

* List any additional topics that must be addressed and by whom

**Roadblocks: Describe roadblock**

* List any roadblocks that must be addressed and by whom

**Action Items: Describe action item**

List any action items that must be completed and by whom

### Review & Publish/Implementation

|  |  |  |
| --- | --- | --- |
| ID Number | Group | Description |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Timeline

|  |  |  |
| --- | --- | --- |
| ID Number | Status | Comments |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## **Notes:**

**Topic:** Describe topic that must be addressed and by whom

**Roadblocks:** Describe roadblock that must be addressed and by whom

**Action Items:** Describe action item that must be completed and by whom

**Topic: Describe topic**

* List any additional topics that must be addressed and by whom

**Roadblocks: Describe roadblock**

* List any roadblocks that must be addressed and by whom

**Action Items: Describe action item**

List any action items that must be completed and by whom

### Deliverables List

|  |  |  |
| --- | --- | --- |
| ID Number | Group | Description |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

### Timeline

|  |  |  |
| --- | --- | --- |
| ID Number | Status | Comments |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## **Notes:**

**Topic:** Describe topic that must be addressed and by whom

**Roadblocks:** Describe roadblock that must be addressed and by whom

**Action Items:** Describe action item that must be completed and by whom

**Topic: Describe topic**

* List any additional topics that must be addressed and by whom

**Roadblocks: Describe roadblock**

* List any roadblocks that must be addressed and by whom

**Action Items: Describe action item**

List any action items that must be completed and by whom

|  |
| --- |
| Submitting Other Request for Document Review Procedure  Note: If multiple articles/topics, multiple requests should be submitted |

### **Document Management Work Instructions**

These Work Instructions were created to guide personnel in document maintenance management.

|  |
| --- |
| 1. Go to the Customer Portal: <https://cfpbprod.servicenowservices.com/servicecenter> |
| 1. Open the document, enter Edit mode, check out the article and download any attached documents. |
| 1. Open a new tab and access the CFPB Customer Portal. (Single sign-on (SSO), no password needed) |
| 1. Select **Other Request** from the list of options. The tab will refresh, and a blank form is shown. |
| 1. On the screen with the blank form, copy the KB# and article title from the article and paste it in the blank form under \***Short Description**. |
| 1. Copy the following message and paste it in the \***Description** field.   *The Knowledge Base article [KB number and name of article] is set to expire on [include expiration date].*  *Please review the article along with any included attachment(s) in this request for accuracy and follow up in one of the three ways included below:*  *1) If the embedded article remains current, without any changes, indicate so in the \*****Work Note*** *field. The article will receive a new '****Valid to****' date for another year and will be republished.*  *2) If the embedded article requires updates, indicate so in the \*****Work Note*** *field to let the team know you are working on the updates. If there is an attached article, please make the updates in the document and attach the new version in this task to send to the Technical Writer. The article will be updated, and the new version of the document attached. A new '****Valid to****' date for another year is given and will be republished.*  *3) If the article should be retired, please indicate this in the \*****Work Note*** *field in this task and it will be retired.*  *Thank you for your assistance. Direct any questions regarding this request through \*****Work Notes*** *in the task.* |
| 1. Submit the request by clicking on the **Request** button on the right. This will create a RITM. |
| 1. Use the copied RITM# to search for the RITM in the search bar in ServiceNow. |
| 1. Access the ServiceNow Knowledge Base articles and search for the article needed. |
| 1. Open the document, enter Edit mode, check out the article and download any attached documents. |
| 1. Open a new tab and access the CFPB Customer Portal. (Single sign-on (SSO), no password needed) |
| 1. Select **Other Request** from the list of options. The tab will refresh, and a blank form is shown. |
| 1. On the screen with the blank form, copy the KB# and article title from the article and paste it in the blank form under \***Short Description**. |

|  |
| --- |
| Creating SCTask for Document Review Procedure |
| 1. Access the ServiceNow Knowledge Base articles and search for the article needed. |
| 1. Open the document, enter Edit mode, check out the article and download any attached documents. |
| 1. Open a new tab and access the CFPB Customer Portal. (Single sign-on (SSO), no password needed) |
| 1. Select **Other Request** from the list of options. The tab will refresh, and a blank form is shown. |
| 1. On the screen with the blank form, copy the KB# and article title from the article and paste it in the blank form under \***Short Description**. |
| 1. Copy the following message and paste it in the \***Description** field.   *The Knowledge Base article [KB number and name of article] is set to expire on [include expiration date].*  *Please review the article along with any included attachment(s) in this request for accuracy and follow up in one of the three ways included below:*  *1) If the embedded article remains current, without any changes, indicate so in the \*****Work Note*** *field. The article will receive a new '****Valid to****' date for another year and will be republished.*  *2) If the embedded article requires updates, indicate so in the \*****Work Note*** *field to let the team know you are working on the updates. If there is an attached article, please make the updates in the document and attach the new version in this task to send to the Technical Writer. The article will be updated, and the new version of the document attached. A new '****Valid to****' date for another year is given and will be republished.*  *3) If the article should be retired, please indicate this in the \*****Work Note*** *field in this task and it will be retired.*  *Thank you for your assistance. Direct any questions regarding this request through \*****Work Notes*** *in the task.* |
| 1. Submit the request by clicking on the **Request** button on the right. This will create a RITM. |
|  |
| 1. Use the copied RITM# to search for the RITM in the search bar in ServiceNow. |
| 1. Open the RITM and change assignment group to SD Documentation. Type the following in the **Notes and Activity** tab: *Assigning to SD Documentation, was Service Desk.* |
| 1. Scroll to the bottom of the RITM and locate the Catalog Tasks tab. |
| 1. Right-click on the task link and open in new tab. Go back to the RITM. |
| 1. On the right, click the New button to create a second task. This will be for the Ownership Group. |
| 1. In the newly created Task Form, fill out the information from the original task |
| 1. In the **SCTASK**, assign to only the group identified\* as the owner of article in the Assigned To field. \*This will be provided by M. Kern or C. Hurkamp during the Organization and Assessment phase. |

**Notes**

Use the Task Filter to find if tasks already exist for this item.

Assigning to [Assignment Group] for next steps.

Use the excel sheet to filter out expiring documents

Use the Expiring Articles Filter

|  |
| --- |
| [Action] Topic for Document Review Procedure |

|  |
| --- |
| 1. Access the ServiceNow Knowledge Base articles and search for the article needed. |
| 1. Open the document, enter Edit mode, check out the article and download any attached documents. |
| 1. Open a new tab and access the CFPB Customer Portal. (Single sign-on (SSO), no password needed) |
| 1. Select **Other Request** from the list of options. The tab will refresh, and a blank form is shown. |
| 1. On the screen with the blank form, copy the KB# and article title from the article and paste it in the blank form under \***Short Description**. |
| 1. Copy the following message and paste it in the \***Description** field.   *The Knowledge Base article [KB number and name of article] is set to expire on [include expiration date].*  *Please review the article along with any included attachment(s) in this request for accuracy and follow up in one of the three ways included below:*  *1) If the embedded article remains current, without any changes, indicate so in the \*****Work Note*** *field. The article will receive a new '****Valid to****' date for another year and will be republished.*  *2) If the embedded article requires updates, indicate so in the \*****Work Note*** *field to let the team know you are working on the updates. If there is an attached article, please make the updates in the document and attach the new version in this task to send to the Technical Writer. The article will be updated, and the new version of the document attached. A new '****Valid to****' date for another year is given and will be republished.*  *3) If the article should be retired, please indicate this in the \*****Work Note*** *field in this task and it will be retired.*  *Thank you for your assistance. Direct any questions regarding this request through \*****Work Notes*** *in the task.* |
| 1. Submit the request by clicking on the **Request** button on the right. This will create a RITM. |
|  |
| 1. Use the copied RITM# to search for the RITM in the search bar in ServiceNow. |

### Follow up language

Circling back on this request. Did you get a chance to review the related documentation? Please let me know of the status and if I can assist in any way.