### **Overview**

This meeting is to serve as a space to discuss backlog items, current and upcoming projects, and any immediate items to be addressed. This meeting will also list priority level, status, and other planning details such as identifying ownership group and effort.

### **Team**

|  |  |  |  |
| --- | --- | --- | --- |
| Role | Name | Email | |
| T&I Infrastructure Project Specialist | Mike Kern | | michael.kern@cfpb.gov |
| COR/Sr Infrastructure Service Desk Specialist | Cathy Hurkamp | | catherine.hurkamp@cfpb.gov |
| Program Manager (PM) | Rafael Samuels | | rafael.samuels@cfpb.gov |
| Technical Writer (TW) | Dany Garcia | | dany.garcia@cfpb.gov |
| Technical Trainer (TT) | Nelly Casseus | | nelly.casseus@cfpb.gov |
| Customer Service Analyst (CSA) |  | |  |
| Other |  | |  |

## **Notes:**

**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

### Documentation Review Objectives

### The purpose of the technical documentation review meeting involves a detailed examination of both the Customer and Service Desk Knowledgebases and the ServiceNow Task list to identify backlog, current, or upcoming expiring items to verify that the document is accurate, complete, and compliant with relevant standards and regulations. This sets the seal on the quality and safety of technical products and systems and can help organizations to avoid costly errors and rework.

### Document implementation purpose contains four objectives:

1. **Discovery** is where artifacts are identified through dashboards filters/reports and requests for creating, updating, archiving, or deleting documents are presented.
2. **Capture** relates to knowledge the Bureau currently possesses. This knowledge may be held by individual employees, teams, documents, or processes. Capturing this information can be done through communication efforts with Subject Matter Experts (SMEs), document owners, Service Desk Technicians (SDTs), and management.
3. **Organization** refers to the classification, categorization, and indexing of information. Knowledge organization enables easy retrieval, navigation, use and sharing of information among employees and teams. Examples of information identified includes Owner/Group, Validity, Status.
4. **Assessment** embodies planning tasks such as priority, timeline, and next steps are established.

### Milestones:

### Discovery & Capture

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| ✔ | **Tasks** |
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### Organization & Assessment

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| ✔ | **Tasks** |
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### Design

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### Development

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| ✔ | **Tasks** |
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### Review & Publish

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| ✔ | **Tasks** |
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### Deliverables List

|  |  |  |
| --- | --- | --- |
| Deliverable | Description | Document Owner |
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### Project Timeline Schedule

|  |  |  |  |
| --- | --- | --- | --- |
| Deliverable | Start | End | Comments |
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### **Document Management Work Instructions**

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

How to

Create SCTasks for documents that need to be updated. Complete the following steps:

**Task: Creating SCTask for tracking document review.**

Description.

 **Guide Me**

|  |
| --- |
| Task Procedures |
| 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 SCTask under the Catalog Tasks tab. Click the link. |
| 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. |

Use the excel sheet to filter out expiring documents

Use the Expiring Articles Filter

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

Assigning to [Assignment Group] for next steps.