### **Document Task Creation Work Instructions**

These Work Instructions were created to guide personnel in creating Other Requests for document review and validation.

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| *Submitting* Other Request for Document Review Procedure  Note: If multiple articles for one owner, a single request may be submitted, with a task per article created. |
| 1. Open the KB article and download any attached documents. (i.e., PDF, Word, PowerPoint; no images) |
| 1. Open a new tab and access the Customer Portal: <https://cfpbprod.servicenowservices.com/servicecenter> |
| 1. Select **Other Request** from the list of options. The tab will refresh, and a blank form is shown. |
| 1. On the tab with the Knowledge Base article, copy the KB# and title from the article and paste it in the blank form under \***Short Description**.   Example:  *Knowledge Base article* ***[KB number and name of article]*** *Validation* |
| 1. Copy the following message and paste it in the \***Description** field, updating the language in bold red.   *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**. |

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| 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. |
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| 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

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| [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. |
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| 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.