



The “How to Document” Document Example

[Company Name]’s Article for “How to Document [Add topic here (Processes, Flags, etc. if for a specific item)]”*

*This is just one example/recommendation. Please change to fit your needs.

Intro:

[Insert your introduction]

Example: This article is to explain how to document [topic or delete if using as a general document] within Hudu. In this article, we will:

- Relate general Hudu definitions to our way of doing business and how they apply to our processes.
- Explain why we document as a whole and why we specifically do things within our documentation.
- Explain how we document specific items.

Definitions:

- [Add definitions applicable to your documentation process]
 - Examples:
 - Asset Layouts: The main structure in Hudu. They serve as containers or categories to group similar types of assets into a single place. These assets within the asset layouts can be people, equipment, passwords, processes, articles, etc. Asset layouts and their fields are created by [insert admin name or position title]. For recommendations on changes, please [insert process for requesting changes].
 - Companies [use whatever you call your structure name]: The “spaces” where specific information is stored and organized within Hudu. Each client, division, etc. gets their own space.

- Our internal company “space” is called “[Company Name]”. You’ll find information about our processes, articles specific to us, passwords for us, and much more.
 - All other spaces are named by the name of the client’s business (e.g. Bob’s Dive Shop).
- Naming Standards [Insert any naming standards you have created. If too long, you can make this a separate “how to document” document.]

- Example:

- Overall Organization Key/Table:

- Division/Department Numbers: These numbers will serve as our organization to indicate the department for the specific asset

- 00 = Admin
- 01 = Accounting
- 02 = Finance
- 03 = Marketing
- 04 = Sales
- 05 = Engineering

Or,

- Division/Department Codes: These codes will serve as our organization to indicate the department for the specific asset

- Adm = Admin
- Acc = Accounting
- Mkt = Marketing
- Eng = Engineering

- Rules for specific naming conventions:

- [Insert your rules for naming convention. Be specific]
- File names should be less than 50 characters and only use alphanumeric characters, dashes, and underscores.
- Do not use spaces.
- Avoid special characters, such as: ~ ! @ # \$ % ^ & * () ` ; : < > ? . , [] { } ' " ' "
- Name documents using our standard naming convention. [Define your specific way of naming. Recommend building a naming standard for documents that can grow as your number of documents grow;

start with the applicable broad category and then add more specific subcategories as needed. (Broad.More-Specific.Even-More-Specific.XXX).

- Examples:
 - Be specific. Determine if you will use dashes (file-name.xxx), underscores (file_name.xxx), no separation (filename.xxx), or camel case (FileName.xxx). Determine if you will use department naming codes/numbers, etc.
 - Example: DepartmentFileDate or Department_File_Date or Department-File-Date].
 - Good Example [Show an image of a good example of how a document is named].
 - Bad Example [Show an image of a bad example of how a document is named].
- Global Process Template (GPTs): Reusable processes that we have created that you will reuse across multiple clients (to serve as onboarding procedures, SOPs, or common checklists).
- KBs:
 - Global = Standard Operating Procedures (SOPs) or Articles that apply to multiple companies [and internal references if you store them here].
 - Client = SOPs or Articles that only apply to that specific company.
 - Internal = Documentation of our internal articles and SOPs [or delete this if you don't have an internal company].
- Relationships: Connect relevant information together, giving the ability to map out our documentation.

Why do we document?

[Insert your reason for documenting]

Example: To create a reliable resource that supports our entire organization. When done right, it can transform the way we work, by making processes smoother and ensuring that knowledge is preserved, accessible, and always up to date.

A strong documentation tool and culture ensures that all organizational knowledge is captured and stored in a central repository—making it easily accessible, comprehensible, and well-known throughout the team. Good documentation can turn from an administrative overhead into a living, breathing part of the organization, radiating value for individuals and the entire workforce.

How do we document [recommend including pictures or links with good/bad examples for each]?

[We've included a few basic examples for you, but this is where you'll include any company specific rules you have regarding any part of your documentation process; procedures/instructions for each item you feel necessary within your Hudu. This is not an all-inclusive list and you may not include many of these because they may not need specific directions for your technicians, but we've included most features within Hudu for ease of thinking through what you need to include. Delete/revise as desired.]

- Examples:
 - Filling in asset layouts [Insert any company specific rules you have regarding documenting assets]
 - Example:
 - Asset layouts and the assets created under them are the most important thing to document well. These are the building blocks of our documentation system. Take time to ensure you have no spelling mistakes. Document. Save. Check. Save. Recheck. Save.
 - Supervisor approval is required prior to skipping a required field that you do not feel you can complete (e.g. Do not put XXX to bypass the required field without supervisor's permission).
 - If applicable asset links for relating items are not provided as asset layout fields, add any related items. [Insert any applicable directions for how you expect technicians to relate items within your instance (e.g. any time you add a desktop/application asset, relate the applicable user and password)]
 - If you need a dropdown option added to a list or have any other recommendations for asset layout changes, [insert process for requesting changes or position title for who will make changes].
 - Good Example [Show an image of a good example or link to an actual good example filled out]
 - Bad Example [Show an image of a bad example or link to an actual bad example filled out]
 - Passwords [Insert any company specific rules you have regarding passwords]
 - Example:
 - When sending a password to a client, unless otherwise requested, always share with these settings selected:
 - Expires in 60 min

- Include user name
- Include OTP
- Add note as needed
- When creating passwords, unless otherwise required, use:
 - Do not add to external share portal
 - Use default length
 - Select “Easier to Remember”
 - Select 6 words
 - Enter OTP
- DO NOT store any passwords in a KB or asset layout field (unless a confidential text field is specified as the asset layout field type)
 - NOTE: Confidential text field passwords DO NOT show up in a clients' password list.
- Good Example [Show an image of a good example or ideally a link to an actual good example]
- Bad Example [Show an image of a bad example or ideally a link to an actual bad example]
- Processes/SOPs [Insert any company specific rules you have regarding completing/adding processes]
 - Example:
 - Read each step carefully.
 - Do not perform any steps that you do not understand. Review related resources and then seek clarification from your supervisor as needed.
 - If you are not able to complete a step, do not mark the step complete. Add comments in the righthand side-bar's comments section with specific details of what you did/didn't do.
 - If responding to a support ticket, click on “Copy completed tasks” at the top of the process and paste the completion step into your time entry.
 - If you need a template process changed or have recommendations on changes, [insert process for requesting changes or position title for who will make changes].
 - When creating a new client, use [insert link to “How to document a new client” process]

- Good Example [Show an image of a good example or link to an actual good example filled out]
- Bad Example [Show an image of a bad example or link to an actual bad example filled out]
- Knowledge Base Articles (KBs) [Add specific instructions for KBs if different than the definitions above. Separate into the types if needed.]
 - Global
 - Client-Specific
 - Internal Company
- Photos [Add specific instructions for taking and uploading photos. Separate into main app and mobile if needed. Recommend being very specific with what you want taken, how many you want taken, how far away you want them taken, what details you need captured, etc.]
 - Main App
 - Mobile
- Relationship mapping rules
- Expirations (SSL certs, warranties)
- Alerts (email and webhooks)
- Dashboard
- Magic dash
- Website & SSL tracking
- Store & relate images/photos
- Documentation quality rating
- Security groups, permissions, restrictions
- Secure share and secure notes
- Personal password vault
- Customer share portal
- IP address management (IPAM)
- Rack management
- Password note sharing
- Data import & export (if using this for an admin document)
- OTP generator

- External Apps
- Others?

[Add any additional headers as desired]

- Examples:
 - Additional resources/training [insert list or links to applicable resources and/or training]
 - Links to other “how-to document” documents (processes, flags, etc.)
 - Change process: If you need anything changed within Hudu, [insert process for requesting changes or position title for who will make changes. Recommend reviewing this document anytime a new release comes out to ensure this document is still relevant/correct].
 - Review periodicity/ownership [recommend adding an expiration date to ensure this article is periodically reviewed]
 - Position descriptions/roles/ownership
 - Naming Standards (if not included in definitions above)