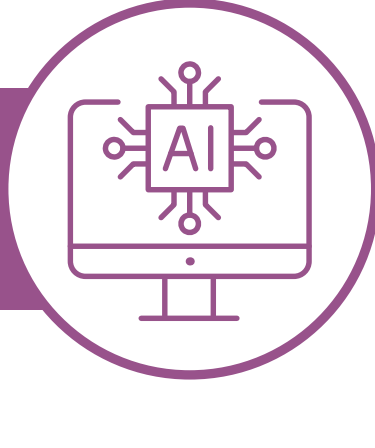


Future-proof documentation with AI

Practical checklist for long-term gains



AI-powered tools like IT Glue's Cooper Copilot can dramatically speed up and improve IT documentation, but only if your information is clean, structured and consistently maintained. This worksheet gives your team a clear, actionable roadmap to get your documentation AI-ready and offers guidance to ensure long-term success after implementation.

You'll walk away with concrete steps to:

- Identify the most critical assets and SOPs to document.
- Apply consistent naming, tagging and folder strategies.
- Set up regular audit and review processes.
- Assign human owners for AI oversight.
- Use IT Glue's AI features effectively without losing control.

Use this worksheet as your go-to playbook for building reliable, AI-ready documentation that drives real operational value. It's built to help you cut through the clutter, set meaningful standards and unlock the full potential of automation, with human strategy leading the way.

Section 1: Strengthen the foundation

Before you implement AI in your documentation solution, you need to ensure there's a solid foundation to build on. This section helps you assess and document your key assets, SOPs and organizational knowledge in a structured, consistent way, laying the groundwork for a system that AI can effectively leverage to enhance and scale your documentation efforts.

Checklist:

- ☐ Do we have the key assets (passwords, licenses, configurations, etc.) our team relies on documented?
- ☐ Are our most critical SOPs written and stored in a place all team members can access?
- ☐ Are all assets, passwords and SOPs stored in an interconnected, centralized solution like IT Glue?
- ☐ Have we defined whether our folder structure is global or per client?
- ☐ Do we have a standard naming convention (e.g., date formats, versions, abbreviations)?
- ☐ Is there a clear owner responsible for reviewing and maintaining our documentation setup?
- ☐ Are assets and SOPs properly tagged and categorized?

Action questions:

- What are the top three integrations we should set-up to ensure assets are synced to IT Glue?
_____/_____/_____
- What are the three asset types that we should clean up, consolidate or audit first?
_____/_____/_____
- What are three naming convention rules we'll apply right away (e.g., date format, versioning)?
_____/_____/_____
- How will we encourage and ensure naming conventions are followed by all team members?

- Who is responsible for maintaining our documentation setup?

Section 2: Establish clear process documentation management

AI's power comes from its ability to automate mundane, recurring tasks, whilst continuously improving and learning as user behaviours change. This section ensures your SOPs are clearly written, organized and integrated within your workflows, maximizing their value by promoting consistency and boosting productivity across your IT organization.

Checklist:

- ☐ Do we have a documented SOP generation and approval process?
- ☐ Have we enabled Cooper Copilot's SOP generator in IT Glue?
- ☐ Is SOP usage actively encouraged across the team?
- ☐ Is there a process in place to identify SOP gaps in our library?
- ☐ Have we determined if we should first audit our existing SOPs or are we starting fresh?
- ☐ Do we have a clear understanding of who is responsible to create new SOPs?

Action questions:

- What are the top three new SOPs we need to create as soon as possible?
_____/_____/_____
- How often will we audit and update SOPs?
☐ Monthly ☐ Quarterly ☐ Bi-annually
- Who will manage audits to ensure assets and SOPs are properly tagged and categorized?

- What process will we follow to review and approve AI-generated SOPs?

Section 3: Creating an accurate picture of your IT environment

Documentation is only helpful if it is an accurate reflection of your IT environment. This section ensures you're leveraging clean-up automation, relationship mapping and intelligent summaries so that your documentation is current and useful.

Checklist:

- ☐ Have we leveraged Cooper Copilot's intelligent asset summaries in IT Glue?
- ☐ Do we run Smart Assist reviews on a regular basis?
- ☐ Are outdated or irrelevant docs being cleaned up?
- ☐ Are we using Smart Relate to automatically create asset relationships?
- ☐ Is someone responsible for reviewing Smart Relate suggestions?

Action questions:

- How frequently will we run Smart Assist reviews?
☐ Weekly ☐ Monthly ☐ Quarterly
- What are the top three cleanup actions we plan to automate?
☐ Archive ☐ Delete ☐ Copy
- Which assets will we prioritize for automated linking with Smart Relate?
☐ Devices ☐ Passwords ☐ SOPs ☐ Other: _____
- Who is responsible for approving automation suggestions and managing cleanup tasks?

- Have we implemented all of the existing AI-powered summaries in IT Glue?
☐ Datto Networking Wireless
☐ Datto BCDR Backup Health
☐ Datto RMM Software Asset Tracker
☐ Entra ID: Security Groups
☐ Microsoft 365: Groups
☐ Active Directory (AD) Security Groups

Final takeaways

Before you wrap up, take a moment to reflect on your next steps. Based on what you've uncovered, what's one improvement you can make today to better prepare your documentation for AI? Where could your team benefit from more structure, automation or oversight?

Use the space below to capture your key next steps:

- What's one improvement we'll implement this month?

- What's one AI feature we'll explore or optimize?

- What potential blockers could prevent our success, and what support do we need to overcome them?

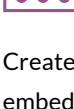
Helpful resources

Want to dive deeper into IT Glue's built-in AI capabilities? These resources offer practical, step-by-step guidance and best practices to help you implement what you've worked through in this checklist using the platform's automation and intelligence tools.

- [Smart SOP Generator](#)
- [Smart Assist](#)
- [Smart Relate](#)
- [IT Glue Integrations](#)

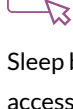
Book a personalized demo to see how IT Glue can streamline your documentation, automate key processes and help your team work smarter with built-in AI tools.

Secure, mature and integrated documentation



Make documentation easy

Create and store KB, checklists and SOP articles effortlessly, embed rich network diagrams or import Word documents so your team is empowered to train and help themselves.



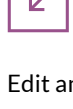
Secure your critical information

Sleep better with next-level password management featuring access control, host-proof hosting, at-risk password report and audit trail.



See the complete picture

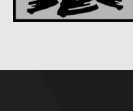
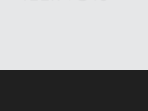
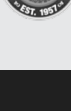
Link related items together, so that all the information you need is at your fingertips. Rapidly define and understand relationships between various elements of your documentation.



Build a documentation culture

Edit and collaborate directly within the platform. Automatically save and sync to ensure your documents are always up to date for all team members.

Trusted by More than 16,000 Partners in 70+ Countries



Safeguard Your IT Operations with Secure Documentation

When it comes to data security, IT Glue is second to none. We have achieved a SOC 2 Type-2 attestation, a set of data security and service controls that can only be maintained through ongoing, company-wide commitment.

