Documentation Road Map

Last updated by | Reshma Mohammed Begum | Apr 30, 2020 at 3:37 PM GMT+5:30

1. Data Review Guidance

- Data Review Articles - Mockup Migration

Overall Statistics

	Planned	Completed	Link to latest list of mockups migrated
	500+new mockups on Digiflow	200	
Percentage of completion		**40%**	https://teams.microsoft.com/l/file/A49C8DAC-C2C2-436D-8E9F-DDCB5F8CD896?tenantId=36da45f1-dd2c-4d1f5abe46b99921&fileType=xlsx&objectUrl=https%3A%2F%2Fresources.deloitte.com%2Fsites%2FUSSolvasDigitizeDocuments%2FDocumentation%2FMockup Migration_Sprintwise.xlsx&baseUrl=https%3A%2F%2Fresources.deloitte.com%2Fsites%2FUSSolvasDigitize_O365 hreadId=19:b82f2693e67d4832a22c0f12775bb0eb@thread.skype&groupId=59a1e0c8-42e6-4bee-8e4f-12feb47

- Training Module Articles

Overall Statistics

	Planned	Completed	Link
	48	48	
Percentage		**100%**	[KB0012389 ↗]

Checklist for Technical Writers:

- ☑ Provide a table of contents for easy accessibility
- ☐ Take feedback of the training module

- Training Videos

Overall Statistics

	Planned	Completed	In-Progress	To Do
	17	3	2	12
Percentage	100%	20%	10%	70%

Plan of Action

Video Topic	Internal/External/Generic	Status	Link
Introduction to Digitize	Generic	Completed	http://techwriting.digitize.sltc.com/final ⬀
Setting up MFA	Generic	Completed	http://techwriting.digitize.sltc.com/settingmfa ⬀
Updating your Okta profile	Generic	Completed	http://techwriting.digitize.sltc.com/updatingokta ⬀
Interest Payment	Internal	In-Progress	http://techwriting.digitize.sltc.com/interestpayment ⬀
Paydown	Internal	In-Progress	http://techwriting.digitize.sltc.com/paydown ⬀
Fee Payment	Internal	To Do	
Rate Set	Internal	To Do	
Drawdown/Borrowing	Internal	To Do	
Pik/Commitment Increase	Internal	To Do	
Commitment Decrease	Internal	To Do	
Spread Change	Internal	To Do	
Rollover	Internal	To Do	
Index Change	Internal	To Do	
Mapping Field Value Rules	External	To Do	
Data View Action Buttons (Alias)	Generic	To Do	
Configuration screens	Internal	To Do	
Document source screen	Internal	To Do	

Checklist for Technical Writers:

☐ To take feedback once we have the transaction videos available.

- training decks

User Manual/ Internal Feature Documents

Overall Statistics of the External Articles

	Planned	Completed	In-Progress	To Do
	70	40	6	24
Percentage	100%	47%	16%	37%

Overall Statistics of the Internal Articles

	Planned	Completed	In-Progress	To Do
Percentage	100%	20%	10%	70%

Topic/Tab/Functionality List

Feature	Tab/functionality	Internal	external	Common
Home	About Solvas Digitize	Yes	Yes	Yes
	Widgets			Yes
Data Views	About Data Views			Yes
	Record Type Check		Yes	
	Mapping Field Rules	Yes		
	Setting up Alias		Yes	
	Mapping a Solvas Asset code in Record Check tab		Yes	
	Portfolio Check		Yes	
	Record Check		Yes	
	Reconciliation		Yes	
Expected Transaction	Expected Transaction			
Processed Transaction	Processed Transaction			
Inbox Documents	Inbox Documents		Yes	
EFT Documents	EFT Documents		Yes	
Key icon>Administrative Area	User Maintenance	No		
	Authorization rules			
	Administrative Log			
System Setup	Intake Service Logs	Yes(not published)		
	Tap Fetch Logs		Yes	
	Communication Interface		Yes	
	System Settings			
	System Configuration			
Configuration	Client			
	Document Source	Yes		
	SLA Rules	Yes		
	Template	No		
	Field	No		
	Import Source	No		
	Dataset	No		
	Field Groups	Yes		
	Mapping Field Value	Yes		
	Lookup	No		
	Normalization	No		

Feature	Tab/functionality	Internal	external	Common
	Alias	No		
	Widget	No		
	Reconciliation Rules	No		
	Reconciliation Processing Steps	No		
	View	No		
	Jurisdictions	No		
	Archiving Rules		Yes	
Contact Management	Contact Management	No		
Document Distribution	Document Distribution	Yes	Yes	

Checklist for Technical Writers:

- ☑ To provide table of contents for the user manual for the external clients.
- ☐ To integrate the table of contents with Help on Prod.

Feature	Tab/functionality	Internal	external	Common