

Marcum K-1 Application User Guide: Gap Analysis

REFERENCE NO.	ITEM	CURRENT STATE	DESIRED STATE	START DATE	DUE DATE	ASSIGNED TO	ACTION ITEMS	PRIORITY	RISKS	COMPLETE	NOTES
1	Initial K-1 Doc Meeting	N/A	N/A	8/5/2019	N/A	Lavina, Tom, Margery, Roy	Participants to review the converted version of the K-1 User Guide ad offer feedback	High	Not able to provide feedback if guide and reviewed	NO	Initial meeting of all team members involved in process.
2	Delivery of User Guide Feedback	Incomplete Conversion	Complete Conversion	8/5//2019	8/9/2019	Lavina	Provide Mark-Up of Changes	High	Conversion would remain incomplete	YES	Lavina emailed Roy marked-up pages
3	Apply Changes to User Guide	Incomplete Update	Complete Update	8/9/2019	8/9/2019	Roy	Apply Updates to User Guide	High	Conversion would remain incomplete	YES	Roy updated user guide and delivered PDF for K-1 Web Site
3.1	Apply Changes to User Guide	Incomplete Update	Complete Update	8/29/19	8/29/19	Roy	Contact Tom on Two Additional Content Items	On-Going	Conversion Not Contain Additional Info	YES	I emailed items to Tom on 8/29, and we spoke on phone. Follow Up Conversation Needed.
4	Post Updated	Version 1.1 Live on K-1 Web Site	Version 1.2 Live on K-1 Web Site	8/12/2019	8/12/2019	Tom	Tom to update production	HIGH	Old version would be live	YES	Tom emailed that Production has been updated.
5	Follow Up K-1 Doc Meeting	N/A	N/A	8/12/2019	8/12/2019	Lavina, Tom, Margery, Roy	Participants brainstormed potential additions to the user guide.	On-Going	Current version would not be as complete as it could be.	YES	Items and ideas thrown out included FAQs, T'sing Info, How tos on functionality, Time Savers and Tips.
6	K-1 Quick Reference Guide	Created 1/10/2017	Redone and Put in Main Doc	TBD	TBD	Various	Various	On-Going	Possibly Outdated Material	NO	Incorporate as Appendix
6.1	K-1 Quick Reference Guide	Created 1/10/2017	Redone and Put in Main Doc	9/5/2019	10/2/2019	Roy	Send PDF to Tom to Mark Up	On-Going	Possibly Outdated Material	YES	Tom to Mark-Up PDF
6.2	K-1 Quick Reference Guide	Created 1/10/2017	Redone and Put in Main Doc	TBD	TBD	Tom	Evaluates Quick Ref for Accuracy	On-Going	Possibly Outdated Material	NO	Tom to Review Info for accuracy
6.3	K-1 Quick Reference Guide	Created 1/10/2017	Redone and Put in Main Doc	TBD	TBD	Tom	Marks Up PDF and Returns to Roy	On-Going	If not done, Roy can't Update	NO	Tom to Mark Up PDF
6.4	K-1 Quick Reference Guide	Created 1/10/2017	Redone and Put in Main Doc	TBD	TBD	Roy	Recreates in main User Guide	On-Going	If not Done, Not included in Guide	NO	Recreate as an Appendix
7	K-1 Tips & Tricks Document	Created 2/28/2017	Redone, Put in Main Doc, Create Individual Handouts	TBD	TBD	Various	Various	On-Going	Possibly Outdated Material	NO	Incorporate as Appendix & Create Select 1-Sheeters
7.1	K-1 Tips & Tricks Document	Created 2/28/2017	Redone, Put in Main Doc, Create Individual Handouts	9/5/2019	10/2/2019	Roy	Send PDF to Tom to Mark Up	On-Going	Possibly Outdated Material	YES	Tom to Mark Up PDF
7.2	K-1 Tips & Tricks Document	Created 2/28/2017	Redone, Put in Main Doc, Create Individual Handouts	TBD	TBD	Tom	Evaluates Tips & Tricks for Accuracy	On-Going	Possibly Outdated Material	NO	Tom to Review Info for accuracy
7.3	K-1 Tips & Tricks Document	Created 2/28/2017	Redone, Put in Main Doc, Create Individual Handouts	TBD	TBD	Tom	Determines which Tips & Tricks to Create 1-Sheeters	On-Going	Possibly Outdated Material	NO	Tom to review info and Determine which ones Need 1-Sheeters
7.4	K-1 Tips & Tricks Document	Created 2/28/2017	Redone, Put in Main Doc, Create Individual Handouts	TBD	TBD	Tom	Marks Up PDF and Returns to Roy	On-Going	If not done, Roy can't Update	NO	Tom to Mark Up PDF
7.5	K-1 Tips & Tricks Document	Created 2/28/2017	Redone, Put in Main Doc, Create Individual Handouts	TBD	TBD	Roy	Recreates in Main User Guide	On-Going	If not Done, Not included in Guide	NO	Recreate as an Appendix
7.6	K-1 Tips & Tricks Document	Created 2/28/2017	Redone, Put in Main Doc, Create Individual Handouts	TBD	TBD	Roy	Creates 1-Sheeters	On-Going	If not Done, no 1-Sheeters	NO	Roy creates 1-Sheeters Based Upon Tom's Recommendations
8	FAQ Section	Possibly Does Not Exist	Possible Creation	TBD	TBD	Lavina, Tom, Margery, Roy	Team to Discuss if Quick Ref and Tips & Tricks Will Serve as FAQ, as well.	On-Going	Unknown, Pending Team Decision	NO	Depending Upon Team Decision, this line item could Unpack into Several Sub-Tasks.
9	Troubleshooting Section	Possibly Does Not Exist	Possible Creation	TBD	TBD	Lavina, Tom, Margery, Roy	Team to Discuss if Quick Ref and Tips & Tricks Will Serve as Troubleshooting, as well.	On-Going	Unknown, Pending Team Decision	NO	Depending Upon Team Decision, this line item could Unpack into Several Sub-Tasks.

10	How to Utilize Functions	Possibly Does Not Exist	Possible Creation	TBD	TBD	Lavina, Tom, Margery, Roy	Team to Discuss if Quick Ref and Tips & Tricks Will Cover Function Utilization, as well.	On-Going	Unknown, Pending Team Decision	No	Depending Upon Team Decision, this line item could Unpack into Several Sub-Tasks.
11	Tom Video Training			TBD	TBD	Various	Evaluate Videos and Mine for User Guide Data	On-Going	If not Done, Useful Info Might not be included	NO	Incorporate Info In Guide Where Appropriate
11.1	Session 1: Basic Intro	Video Created	N/A	TBD	TBD	Various	Mine Video for User Guide Info	On-Going	If not Done, Useful Info Might not be included	NO	Topics Include Basic Intro, Create/Edit Screen, Workpaper Navigation
11.1.1	Session 1: Basic Intro	Video Created	N/A	8/6/19	8/6/19	Roy	Complete Initial Viewing of Video	On-Going	If not Done, can't Eval Material	YES	Roy gave the video an Initial Viewing
11.1.2	Session 1: Basic Intro	Video Created	N/A	TBD	TBD	Roy	Review Video as Needed for Learning Curve	On-Going	If not Done, Cannot Comprehend Material	NO	Complete as Time Allows
11.1.3	Session 1: Basic Intro	Video Created	N/A	TBD	TBD	Roy	Cross Match Video Content to Current User Guide for New Content and Potential Processes	On-Going	If not Done, Cannot Maximize Content	NO	Complete as Time Allows
11.1.4	Session 1: Basic Intro	Video Created	N/A	TBD	TBD	Roy	Create New User Guide and Process Doc	On-Going	If not Done, Cannot Maximize Content	NO	Complete as Time Allows
11.1.5	Session 1: Basic Intro	Video Created	N/A	TBD	TBD	Tom	Reviews/Marks-Up PDF for New Doc	On-Going	If not Done, Cannot Verify Accuracy of new Doc	NO	Complete as Time Allows
11.1.6	Session 1: Basic Intro	Video Created	N/A	TBD	TBD	Tom	Delivers Marked-Up PDF to Roy	On-Going	If not Done, Cannot Verify Accuracy of new Doc	NO	Complete as Time Allows
11.1.7	Session 1: Basic Intro	Video Created	N/A	TBD	TBD	Roy	Applies Mark-Up Edits to Doc	On-Going	If not Done, Cannot Verify Accuracy of new Doc	NO	Complete as Time Allows
11.2	Session 2: Excel Plugin	Video Created	N/A	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 11.1.1 through 11.1.7	On-Going	If not Done, Cannot Verify Accuracy of new Doc	YES	Complete as Time Allows
11.3	Session 3: Download Page, Part 1	Video Created	N/A	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 11.1.1 through 11.1.7	On-Going	If not Done, Cannot Verify Accuracy of new Doc	YES	Complete as Time Allows
11.4	Session 3: Download Page, Part 2	Video Created	N/A	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 11.1.1 through 11.1.7	On-Going	If not Done, Cannot Verify Accuracy of new Doc	YES	Complete as Time Allows
11.5	Session 3: Download Page, Part 3	Video Created	N/A	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 11.1.1 through 11.1.7	On-Going	If not Done, Cannot Verify Accuracy of new Doc	YES	Complete as Time Allows
11.6	Session 4: Partnership Page	Video Created	N/A	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 11.1.1 through 11.1.7	On-Going	If not Done, Cannot Verify Accuracy of new Doc	YES	Complete as Time Allows
11.7	Session on Tiering	Video Not Created	Video Created	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 11.1.1 through 11.1.7	On-Going	If not Done, Cannot Verify Accuracy of new Doc	NO	Complete as Time Allows
12	Identify & Document K-1 Processes	Not Documented	Documented	TBD	TBD	Tom & Roy	Start Working on Processes	On-Going	If not Done, Process not in Main User Guide	NO	Complete as Time Allows.
12.1	Process Category: Publish	Not Documented	Documented	TBD	TBD	Tom & Roy	Start Working on Process	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.1.1	Sub-Process: Auto	Not Documented	Documented	TBD	TBD	Tom & Roy	Start Working on Process: Auto	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.1.1.1	Sub-Process: Auto	Not Documented	Documented	TBD	TBD	Tom & Roy	Tom Gives Roy a Tutorial on Sub-Task	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.1.1.2	Sub-Process: Auto	Not Documented	Documented	TBD	TBD	Roy	Roy Documents Sub-Process & Submits PDF to Tom for Mark Up	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.1.1.3	Sub-Process: Auto	Not Documented	Documented	TBD	TBD	Tom	Marks Up PDF and Returns to Roy	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.1.1.4	Sub-Process: Auto	Not Documented	Documented	TBD	TBD	Roy	Roy Applies Edits	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.

12.1.2	Sub-Process: Custom	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.1.3	Sub-Process: Footnotes	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.2	Process Category: Package	Not Documented	Documented	TBD	TBD	Tom & Roy	Start Working on Processes	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.2.1	Sub-Process: Preview	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.2.2	Sub-Process: Full	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.3	Process Category: Locking	Not Documented	Documented	TBD	TBD	Tom & Roy	Start Working on Processes	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.3.1	Sub-Process: Workpaper	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.3.2	Sub-Process: States	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.4	Process Category: Finalizing	Not Documented	Documented	TBD	TBD	Tom & Roy	Start Working on Processes	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.4.1	Sub-Process: Workpaper	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.4.2	Sub-Process: Package	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.5	Process Category: Review/Signoffs	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.6	Process Category: PDF Pulling	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.7	Process Category: Comparing	Not Documented	Documented	TBD	TBD	Tom & Roy	Start Working on Processes	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.7.1	Sub-Process: Audit Changes	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.8	Process Category: GoSystem Syncing	Not Documented	Documented	TBD	TBD	Tom & Roy	Start Working on Processes	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.8.1	Sub-Process: Creating Workpaper	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.8.1	Sub-Process: Editing Workpaper	Not Documented	Documented	TBD	TBD	Tom & Roy	Sub-Tasks Exact Same as Those Identified in 12.1.1.1 through 12.1.1.4	On-Going	If not Done, Process not in Main User Guide	NO	Process Proposed by Tom. Complete as Time Allows.
12.9	Process Org Approach	No Org Decision	Org Decision/Approach	TBD	TBD	Lavina, Tom, Margery, Roy	Decide Org Approach for Processes	On-Going	Must Do	NO	Decide How to Inject Processes into Main User Guide: New Section or Blended.