



The Magical Checklists

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Agenda

- Before you accept the project checklist
- Kickoff checklist
- The Writing checklist
- Post-Review checklist
- Publishing checklist

Before-you- accept-the-project checklist

- Do I have a firm understanding of the domain?
- Do I have a firm understanding of the application?
- Do I have an understanding of the tools and processes?
- How much time do I require to get trained? What are the training resources available at my disposal?
- Can I manage the project on my own, or should I ask for additional resources?
- If collaborative, what is the composition of my writing team? How will I communicate with them?

Kickoff checklist

- What is the scope of the project?
 - New document – If new, who does the TOC review?
 - Updates to a previous document
 - A combination of both
 - Number of documents
 - Software required to create these documents
- What kind of process does the project follow
 - Agile, Iterative etc.
- What are the timelines for the project?
- Who will provide the updates? – QE, Dev, Managers?
- How will the updates be provided?
 - Demos, feature specs, HLD, LLDs etc.

Kickoff checklist

- If a part of the work is being outsourced to vendors, their contact details, and regular meetings with them
- Review process
 - Software to be used for review, bug tracking system, mails etc.
- Location of the builds
- The various milestones
 - GUI freeze date, code freeze date etc.
- Graphics, Multi-media
 - Source content for these
- Release Notes and Tech Docs
- Localization scope

Kickoff checklist

- Production
 - Formats in which the final output will be published
 - Guidelines for publishing in each of those formats
 - People responsible for production
 - Availability of production checklists if you are doing it yourself
- Version control and Backup mechanisms
 - Ensuring integrity of the document
- Any additional requirement beyond the scope of the project
 - String reviews, UI checks, additional documents and graphics, blogs
- Hardware and Software requirements
- Style guides and access to process docs

Writing checklist

- Style check
- Blank page check
- Grammar check
- Spelling check
- Status check
- Graphics check
- Formatting check
- Legal checks – copyright marks
- Hyperlink, variable, and cross-reference checks
- Conditional text checks
- Key stroking checks

Post-review checklist

- Comments received from various quarters
 - PDF, email, telephone etc.
- Number of comments received from reviewers
- Quality of comments received
- Legacy content reviewed?
- Tracking comments and closing them
- Style, spell check, and grammar check after incorporating comments
- Obtaining a sign off after each review process

Publishing checklist

- TOC, Bread crumbs, and other navigational aids function as intended
- Date of publishing, copyright page are updated
- Formatting of headings and body content
- Search throws up the correct results
- Comments do not appear in the final source files
- Hyperlinks and cross-references work as intended
- No blank/missing pages
- Latest updates reflected
- Help opens through the application on pressing F1
- Clarity of images and multimedia files
- Version numbers updated



Thank You



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