

Technical Document Review Checklist	
Document Type	Checklist Template
Applicable for	<ul style="list-style-type: none"> ◆ Manuals – user, system, reference ◆ Feature Documents and ◆ Application Related Internal Document
Notes	The checklist is used by the writer to review the document against the language specifics, scenarios, application coverage areas etc.
	It is expected that the checklist be evolved and modified at each review level.
Interpretation	It is expected that the result column be “Y” EVERY WHERE.

	Verification Category	S N	Checklist Item	Result Y/N
1	English Language	1.1	The document is checked against Grammatical Errors	
		1.2	Statement Construction reviewed (simple 8-12 words)	
		1.3	Punctuation marks properly used	
		1.4	US English used	
		1.5	Spell checked	
		1.6	To the point presentation using bullets	
		1.7	Continuous flowing consistent language	
		1.8	Appropriate use of repetitions, illustrations explanations, analogy's	
		1.9	Zero use of abbreviations	
2	Page and Document Layout	2.1	Headers, Footers, Figures, illustrations tables and page style is defined and is consistently being used	
		2.2	Page Layout maintained	
		2.3	QA templates used	
		2.4	Versions maintained	
		2.5	Ease in navigation within document	
		2.6	Updated Index and Tables	
		2.7	References are added as a separate list	
		2.8	Indexes, bookmarks are used appropriately	
3	Subject Content	3.1	The depth of the document for the readers vs. ease of use	
		3.2	Each aspect is being covered	
		3.3	Clarity: Each topic is clearly explained	
		3.4	Brevity: Explanation is made to the point, self explanatory yet not lengthy,	
		3.5	Precision: the statements use precise words that are significant to the domain usage	
		3.6	Is the document categorization appropriate	
		3.7	Presentation format used: [e.g. introduction/content/summary]	
4	Technical Terms Usage	4.1	Domain Specific terms are being used specifically with the proper explanation	
		4.2	Technical inputs, screens/forms are detailed with the appropriate explanations	
		4.3	All the topics are explained equally with same emphasis on technical terms	
		4.4	Unnecessary technical jargon is avoided	

5	Application Coverage	5.1	Each screen is being covered in the document	
		5.2	The document can be treated as one point reference point for all the questions users may ask	
		5.3	The document covers each type of scenario that can arise in permutations and combinations of fields/events	
		5.4	A separate user matrix is prepared to analyze the scenarios	
		5.5	“What if” analysis is done on complex and most commonly used scenarios	
		5.6	Common routines that are used frequently are explained in detail at each small step/ process level	
		5.7	The processes that are correlated or dependent on a process are mentioned so that the reader can establish a correlation while reading	
		5.8	Application covers the master setups, conditional values and the constraints on the values being inserted in the forms	
6	Functional Coverage	6.1	The document can be tracked against each functional point mentioned in the SRS document	
		6.2	The scenarios covered are described start to end without missing any major or minor steps	
		6.3	Functional areas that are automated in the application are all covered in the document	
		6.4	All the interfaces that are external are clearly defined so	
		6.5	The role of the application is clearly defined	
		6.6	The minimum basic interfaces / external applications that are required to run it are outlined	
		6.7	Exceptional cases are covered in the scenarios	
		6.8	Functional points explained here are verified by a subject expert	
7	Common Issues Coverage	7.1	Common problem areas resolution is added as an annexure to the document	
		7.2	Issue Tracker Resolved points are attached for the user's reference	
		7.3	Common Rescue checklist is attached to aid the use in case of the problems faced	
		7.4	Link to change requisition available for updates	
8	Usage tracking	8.1	Support team	
		8.2	Installation team	
		8.3	Client/end user	
		8.4	Training team	
		8.5	Marketing team	

Checklist for Reviewing Documentation

The following checklist contains a list of general questions to look for when reviewing documentation of software development projects.

1. Has it been considered that the document is embedded in a software project?
 - Does the document show where it falls in the total plan?
 - Does the document indicate other documents that may be used as follow-up?
 - Is there provision for making changes?
 - Will changes in the system cause difficult or expensive changes in the documentation?
2. Are the contents of the document adequate?
 - Coverage of topics:
 - ~~///~~ All essential topics complete?
 - ~~///~~ Have irrelevant topics been kept out?
 - ~~///~~ Topics complete, but is there completeness in detail, assumptions, facts, unknowns?
 - ~~///~~ Is technical level appropriate to level of document?
 - Correctness
 - ~~///~~ No errors of fact?
 - ~~///~~ Are there no contradictions?
 - Evidence
 - ~~///~~ Is the evidence adequate to support the presentation?
 - ~~///~~ Is the evidence realistic?
 - ~~///~~ Is there a clear statement of goals of the document? Are the goals consistent?
 - ~~///~~ Does the representation sound authoritative?
3. Are the materials in the documents clear?
 - Are examples used where necessary?
 - Are examples relevant where used?
 - Do examples contribute to understanding?
 - Are examples misleading?
 - Are examples wrong?
 - Are examples less effective than their potential?

- Are diagrams or pictures used where necessary?
- Are diagrams or pictures relevant where used?
- Do diagrams or pictures contribute to understanding?
- Are diagrams or pictures misleading?
- Are diagrams or pictures wrong?
- Are diagrams or pictures less effective than their potential?
- Do diagrams or pictures contain an appropriate amount of information?
- Is terminology consistent throughout all documents?
- Is terminology conform to standards?
- Is there a glossary, if appropriate?
- Are definitions correct?
- Are definitions clear?
- Is the glossary complete?
- Is there too much technical terminology?
- Is writing style clear?
 - ~~///~~ Do paragraphs express only connected ideas and no more?
 - ~~///~~ Are larger logical units broken by subheadings?
 - ~~///~~ Is the fog index to high for the audience?
 - ~~///~~ Does it talk down to the typical reader?
 - ~~///~~ Does it put you to sleep?
 - ~~///~~ Is there an abstract?

4. Is the document adequately supplied with referencing aids?

- Is there a table of contents, if appropriate?
- Is the table of contents well placed?
- Is there an index, if appropriate?
- Is the index well placed?
- Is the table of contents correct?
- Is the index correct?
 - ~~///~~ Are page references accurate?
 - ~~///~~ Are the entries under the right titles?

- ~~///~~ Are there alternate titles that might be accessed using different terminology?
- ~~///~~ Are terms broken down adequately, or are there too many page references under single terms, indicating that more subcategories are needed?
- Is there a bibliography of related publications which may contain further information?
 - ~~///~~ Are the references complete enough to locate the publications?
 - ~~///~~ Are there annotations to help the reader choose the appropriate document?
- Does the organization of the document themselves contribute to the ease of finding information?
 - ~~///~~ Is page numbering sensible?
 - ~~///~~ Is page numbering complete?

Documentation plan description.

Any documentation project requires you to do a great deal of research and analysis. Before you can start any work on documentation, an agreement has to be reached with our client about the purpose of the documentation, the audience(s) for the documentation, and the context in which the documentation will be used. We also have to reach an agreement about work schedules and responsibilities. As a first step, analyze your audience and their work context, develop both a preliminary and a detailed list of the tasks to be documented, and establish production schedule. You will present all of this information in a Documentation Plan.

A purpose of a documentation plan is to share your understanding of audience needs, specify tasks to be documented and assign timelines and responsibilities. This is in regard to team work.

Audience Analysis

Before you figure out what tasks you will document, you need to determine specific characteristics of the people who will use the documentation you produce. To analyze your audience and their documentation needs, your team will conduct research on your primary and secondary audiences. This research will include at least one interview and at least one survey, focus group, and/or field observation. The information you develop during the audience analysis forms a major subsection of the final Documentation Plan.

Task List

At the same time that your team is analyzing your audience, you'll be compiling a task list. The preliminary task list identifies all of the tasks that the system performs; the final task list identifies all of the tasks that you will be documenting. Because it's not possible (or at least reasonable) to document all of a system's functions for a given audience in a specific context, you will use your audience analysis and a statement of objectives to cut down your preliminary list to arrive at your final task list. Once you've arrived at your final task list, you'll write a detailed task description for each task.

Production Schedule and Resources

The production schedule identifies the timelines for the project and the resources (personnel and material) that will help you meet your deadlines. The schedule will include some kind of graphical timeline or chart that indicates milestones for the project, and it will also outline the specific people and technology you'll need to rely on to get things done on time. Your schedule should also identify any potential problems or special considerations that may need to be resolved.

Specifications of a Documentation Plan

The documentation plan should serve as a road map for writing working on the document and should include as much information as possible about the text itself and about other constraints affecting the writing process. It should contain the following parts:

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- ?? - identification of the document (this also includes a general description of format, media, and delivery method)
- ?? - table of contents and overview
- ?? - audience definition (this is audience analysis)
- ?? - document outline (this is task list and organizational plan)
- ?? - resource personnel
- ?? - your needs within the company
- ?? - schedules and milestones (this is your production schedule)
- ?? - budgets available
- ?? - potential problems and considerations

What comprises of a professional Documentation Plan?

A professional documentation plan fully achieves the communicative purpose of the assignment: sharing information about the work to be completed with the instructor, members of the client team, and members of the writing team.

- contains a detailed and thorough audience analysis
- contains a comprehensive task list with detailed and completely accurate task descriptions
- includes a detailed production schedule that accounts for time frames, personnel and material resources
- contains all of the elements outlined in your textbook and includes any additional relevant elements
- demonstrates a thorough understanding of the writing context
- conforms to all conventions of formatting and presentation
- is free of all typographical and grammatical errors