

Checklist documentation

Use

With this checklist you can detect two things: strengths and weaknesses in the documentation system of the project and formulate quality objectives.

It is best to discuss the list point by point with your team. You can thus identify procedures that have proved to be useful or less successful, as the case may be. This list might also give you some ideas to think about which had not previously occurred to you.

Contents

Types of documents

What types of documents are there in our project?	
Minutes of meetings	<input type="checkbox"/>
Structural plans (organization charts, embedding)	<input type="checkbox"/>
Planning tools (Planning chart)	<input type="checkbox"/>
Contracts and agreements	<input type="checkbox"/>
Concepts and drafts	<input type="checkbox"/>
Personal memos, notes	<input type="checkbox"/>
Course and training documents	<input type="checkbox"/>
Publications (reports, articles, talks)	<input type="checkbox"/>
Texts (literature, legal texts, etc.)	<input type="checkbox"/>
Correspondence	<input type="checkbox"/>

Remarks:

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What is documented and filed?

We document the following:	yes	in part	no
Visions, project- and quality objectives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strategies and measures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Milestones (intermediate objectives)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Planning of resources and costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project organization/networking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Deadlines and open issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Successes and disappointments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conflicts within the team or with external partners/contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rules and regulations for the team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone calls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Remarks:

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Format

Identification of documents

Our documents show clearly...	yes	in part	no
the most recent version	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
the author	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
the date of creation or last update	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
the date of last changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
the destination (who it is distributed to)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Structure of documents

Our documents are ...	yes	in part	no
easily identifiable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
created with templates or according to a model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
short and concise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
clearly arranged and well structured	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
comprehensible for all addressees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
still comprehensible after a period of time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Remarks:.....

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Document management

Version handling

Our filed documents show clearly...	yes	in part	no
the most recent version	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
what happened with earlier versions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Utilization of documents

Our documents are...	yes	in part	no
usually used only once and then filed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consulted once in a while	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
consulted repeatedly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Document filing

For the filing of our documents ...	yes	in part	no
we have certain rules and regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
we have an index or register	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
we have designated a person who is responsible	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Type of archiving

Our documents are filed or archived...	yes	in part	no
in paper format	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
in electronic format	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In only one place	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
in several places	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Remarks:

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