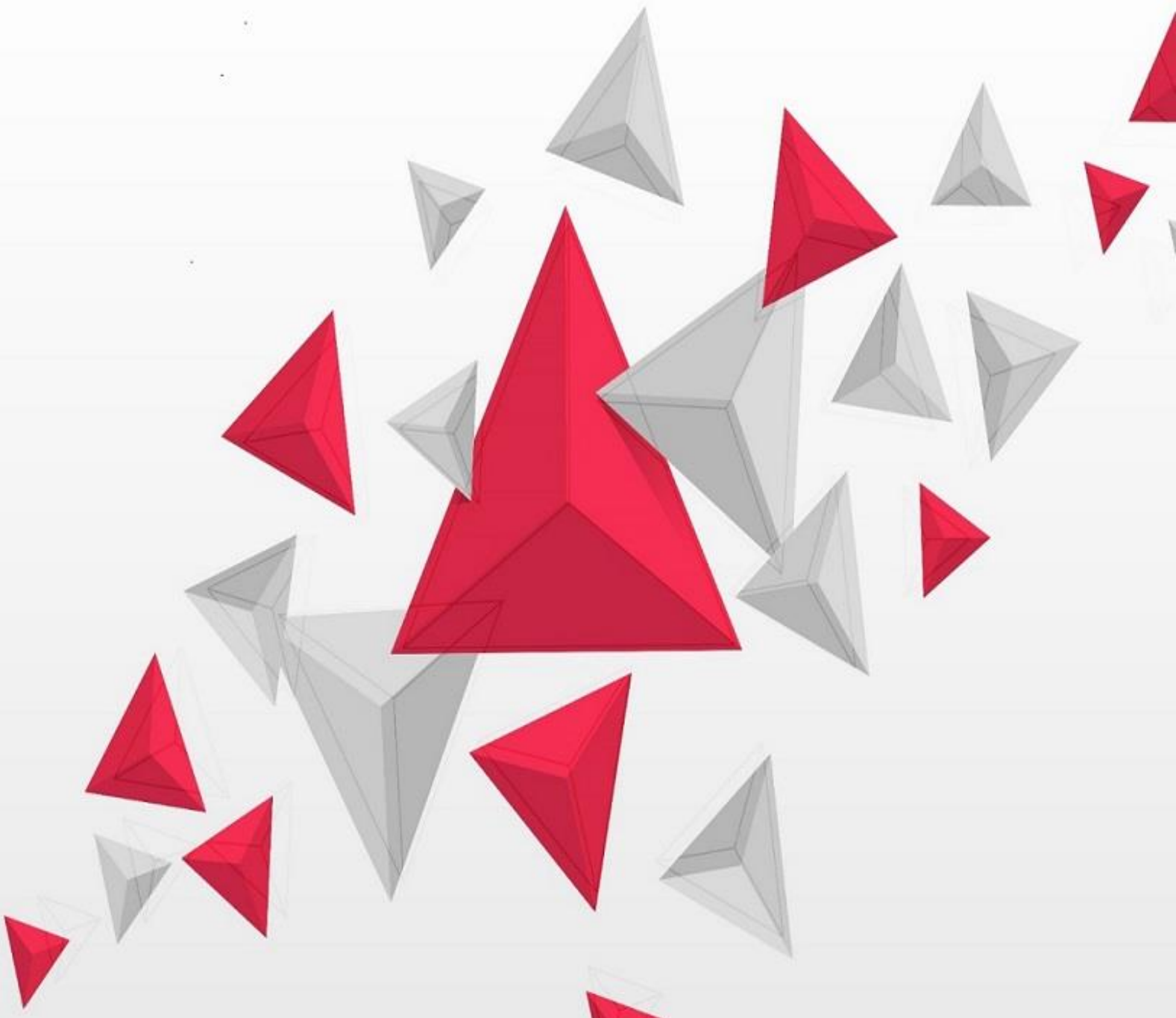


# Document Review Checklist

## Guide Book





## DOCUMENT REVIEW CHECKLIST – INTRODUCTION

Have you ever shared a document with your superiors and higher management only to find out that they have pointed out some glaring grammatical and formatting errors?

Well, although we may try to shrug it off our shoulders, saying, “To err is human, isn’t it?” but frankly, errors like these are humiliating, portrays a lack of attention, and worst, they affect the image of the analyst in front of the reviewer.

So, from the next time onwards, you spell check and review your document, but it may *still* fall short of a comprehensive review until you have a categorized listing of all what the documents should contain. And that’s exactly what we are going to discuss today – the “Document Review Checklist”.

Although self-evident, if you fancy a definition, we may describe the ‘Document Review Checklist’ as a document containing the categorized, section-wise listing of all the checkpoints the document should pass before it’s shared with the reviewers.



## ASPECTS OF A DOCUMENT REVIEW CHECKLIST

We will now cover the aspects of the checklist.

The checklist is a relatively easy-to-use document that could be prepared in Microsoft Word, Google Docs, or even spreadsheets. It contains various categories or sections like Layout and Format, Writing Style and Standards, Grammar and Punctuation, and Traceability. Each of these sections includes checkpoints that should be verified within the document being reviewed. The verifications results are updated within the checklist, and the respective checklist should be saved for future evidence.

Also, although the checklist remains mostly the same irrespective of the type of document it's used for, however, if required, the analyst should feel free to tweak it by adding/removing the checks.



## VALIDATING A DOCUMENT WITH THE REVIEW CHECKLIST

Once a document is complete and ready for a self-review, the BA should pick a section from the review checklist, take individual checks within that section (one at a time), and validate whether they are implemented in the document. The verification results should be updated against each of the points:

Checked and found 'implemented' (Status = Yes),

Checked and found 'not-implemented' (Status = No),

Not Checked (Status = Blank),

Or, the scenario is not applicable (Status = NA)

**Note** - Since there is no universal standardization of review checklists, our discussion revolves around the sections available with the template provided with this lesson.

Now, there are seven main sections within the checklist:

1. **Layout and Format** is the first section and contains quite a good number of checks against the table of contents, headers, footers, margins, font, indentation, and many other aspects that make the complete document look visually and aesthetically consistent.  
If you are pressed against time and are not able to do a thorough review, you should at least check this section as any mistakes within this section are glaring and can be picked without even reading the document.
2. **Writing Style and Standards** come next and contain checkpoints against the document's language. It stresses checking that the sentences are complete and short, using active voice as much as possible, using domain-relevant terminology, not being gender-specific, and making sure that the document is logically organized.

The checks within this section may take you quite a reasonable amount of time if you do it for the first time. I would suggest that at least for the primary 3-4 documents you author, read this section before starting your documents and read again while you are in the middle of it. This way, you will be aware of the checks the document will be subjected to and can take care of the same while drafting.

3. Moving on to the next section, **Grammar and Punctuation** contains checkpoints that revolve around validating the language used, its meaning, and semantics in the document. **Just like the Writing Style and Standards section, make sure you read these points well in advance.**
4. In the **Images, Tables, and Diagrams** section, the checkpoints ensure consistency between the diagrams and tables used, their captions, formats, and alignment. Validating this checklist is pretty straightforward and could be done even when you are short on time.
5. Another short but vital section is **Traceability**, which ensures that all the versioning information and change details are adequately captured within the document's Version History. This is usually the first thing any reviewers look at and should not be missed at all.
6. Many checkpoints do not fall within the boundary of any of the sections we have discussed till now but should be checked, nevertheless. This includes **validating whether all calculations and names or files/directories are correct, hyperlinks and internal cross-references are valid**, and other checks related to the technical inputs that go into the documents authored by the BA.
7. The last, but far from the least, is a section that I have especially included for the requirement documents that we analysts' author. Writing detailed requirements documents like user stories and use cases is always tricky, and there are many things that the analyst should remember to make his documents top-notch. However, it's quite possible to miss some of those aspects in the absence of a checklist, *but* not anymore.  
The **Requirements Coverage** checklist I have put across is one that I have been using all these years and contains the essential verifications the requirements should be put through. It tests whether the requirements align with the project's

business case, whether all dependencies on other systems have been identified, whether all quality attributes (characteristics) have been appropriately specified, whether the requirements are free of duplication, and many others.

Verifying your documents through this checklist should be considered a part of your documentation and not an additional task. And, I would recommend that while you are estimating the amount of time it will take to author the requirement documents, you should also include the checklist verification time as well so that neither you nor your manager feels that you are seeking additional time than expected.

A proper evaluation from your end ensures that the document is crisp and lucid while removing ambiguities that could cause confusion and disagreements in the future. Remember, 'a stitch in time saves nine'!



## DOCUMENT REVIEW CHECKLIST - BENEFITS

Speaking about the benefits of using a review checklist, there are many:

1. The first and pronounced benefit is that checks and self-reviews help find errors, flaws, missing or repeated information, and unintended mistakes in the document.
2. Next, subjecting your project document through a structured check before finalizing them and following the same checklist for all your documents helps maintain consistency throughout the project artifacts and gives a professional outlook to your documents – something that speaks volumes about you as an author.
3. Reviews increase the accuracy of the information contained within the documents and help prevent any situations of ambiguity in the future.
4. Following the practice of continuous review increases the standards of project artifacts, and the analysts develop an eye for details.
5. A review checklist that is continuously updated for new checkpoints throughout the lifecycle of a project and shared on the organizational knowledge base becomes an ideal candidate to help future projects maintain the same high documentation standards right from the project initiation.