

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	
Structural plans (organization charts, embedding)	
Planning tools (Planning chart)	
Contracts and agreements	
Concepts and drafts	
Personal memos, notes	
Course and training documents	
Publications (reports, articles, talks)	
Texts (literature, legal texts, etc.)	
Correspondence	
Remarks:	

W	∕hat	is	docum	ented	and t	filed	?
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We document the following:	yes	in part	no
Visions, project- and quality objectives			
Strategies and measures			
Milestones (intermediate objectives)			
Planning of resources and costs			
Project organization/networking			
Deadlines and open issues			
Successes and disappointments			
Conflicts within the team or with external partners/contacts			
Rules and regulations for the team			
Meetings			
Phone calls			
Format			
Identification of documents		:	
Our documents show clearly the most recent version	yes	in part	no
the author			
the date of creation or last update			
the date of last changes			
the destination (who it is distributed to)			
Structure of documents		_	
Our documents are	yes	in part	no
easily identifiable			
created with templates or according to a model			
short and concise		<u> </u>	
clearly arranged and well structured comprehensible for all addressees			
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still comprehensible after a period of time			
Remarks:			
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	•••••	•••••	••••••

Document management

Version handling

Our filed documents show clearly	yes	in part	no
the most recent version			
what happened with earlier versions			
Utilization of documents			
Our documents are	yes	in part	no
usually used only once and then filed			
consulted once in a while			
consulted repeatedly			
Document filing			
For the filing of our documents	yes	in part	no
we have certain rules and regulations			
we have an index or register			
we have designated a person who is responsible			
Type of archiving			
Our documents are filed or archived	yes	in part	no
in paper format			
in electronic format			
In only one place			
in several places			
Remarks:			••••••
		•••••	