BLUEBRIDGE CHECKLIST AND PROJECT PLAN FOR GLOSSARY

On Microsoft SharePoint / O365 / Office Cloud

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1   INTRODUCTION AND COMMON MISTAKES

Each project is different. Therefore, the following checklist, phases and task groups give you only a rough guideline for your project plan.

Nevertheless, we often see the same mistakes again:

- If you plan a glossary not only for your small team and you want to reach a bigger audience, then <u>prefill</u> your glossary with a relevant number of items before you open it to all readers. A very small glossary will be disappointing and readers won't come back.

- There are many applications and other information sources in your company. Don't think all your colleagues are just waiting for your glossary. You need to <u>promote and "sell"</u> it internally.

- You learned in the internet that some free information sources, like Wikipedia, are still growing and growing. A lot of highly motivated authors are working on that for free. Usually this won't work in a company. The employees don't have time for that. To fill your glossary the creation of glossary entries <u>must be a task as all other tasks</u> for the authors. This means the authors need time for that work, targets and you need to control the result. It should be a clear agreement how many entries an author must create in a specific time.

Focus

In praxis, there is no clear difference between a glossary and a lexicon. A glossary focuses on the explanation of terms, where a lexicon has a broader approach and provides knowledge to topics. It often provides more than a short explanation. Nevertheless, there is no clear border.

<u>In this paper, we understand a glossary as a collection of terms, which are explained</u>. Despite there are many common aspects, we don't see this paper for a lexicon like Wikipedia.

Phases

The following phases show you the main tasks in a glossary project. Not all of them are necessary in all projects. In the most cases the phases are overlapping.

We see generally the following phases (task groups):

- Planning and Project Setup
- Glossary Prefill
- Promotion and "Selling"
- Maintenance and Control

2 PLANNING AND PROJECT SETUP

2.1 Phase description

A good planning is an important success factor.

2.2 Time table

As in other projects the basis for a good result is a good timetable agreed by all project members

Phase	Date finished
Planning and Project setup	
Glossary Prefill	
Promotion and "Selling"	
Production and Maintenance	

2.3 Estimated Quantity

	Initially	After 1 year	After 2 years
Items count			
Storage			

2.4 Roles

Role	Description	SharePoint Permission Level
Readers		
All Readers	Who can (has permission) read the glossary? Can be all emplyoees of a company. But often it isn't relevant for all.	*Reader*
Core Readers	Who are the target group for this glossary?	*Reader*
Test Readers	Especially in the prefill phase we recommend a test group of reader, who check if the description understandable.	*Reader*
Authors		

All Authors	All persons, who have the permission to create an entry.	Member
Authors Prefill Phase	All authors who are part of the prefill phase. Means the first phase before the glossary will be opened to all readers.	Member
Core Authors	The authors who are responsible for maintenance of glossary and in later phases. Often only a part of the authors in the first phase.	Member
Additional experts	In some cases, (often in very specific glossaries) the help of topic experts are needed. The experts can create or edit a glossary entry by themselves or just support an author.	Member or Readers
Approver/Reviewer		
Approver	Sometimes the entries need to be approved by other authors or by special approvers.	Member
Administration		
Technical Administrator	Contact and responsible for technical questions. The tasks are creation of glossary page and list. In SharePoint, the technical administrator is often the "Site Collection Administrator".	*Site Collection Administrator. Site Owner*
Project Management		
Project Leader	The project leader is not identical with the glossary responsible. The project leader is in charge of this project, but not responsible for the content.	Member or Site Owner
Project Steering Committee	A steering committee only makes sense in large projects.	At least reader
Glossary Responsible	The person who is responsible for the quality and quantity of the glossary.	Site Owner

3 GLOSSARY PREFILL

3.1 Phase description

As mentioned in the introduction an often-made mistake is to open the glossary too early. The first visitors might get disappointed and won't come back.

Procedure

We recommend the following steps

Step	Description
Detail plan and guideline	
Detail plan	Contains a timeline for: • how many entries are created by the end of this prefill phase • often it is the best to define the terms before you add the description to each term • split the amount of the entries in 2-3 packages • assign the terms to the authors are fix rules for assignment • specify if an approval is necessary and fix the mode for approval
Guideline	Guideline for authors contains: • how an entry should look like and • if there are additional structured attributes • Add some examples to your guideline
Fill in and approval	
	Work on your glossary
Control	
Control timetable	As project leader control your time table as in all your projects
Control content	We recommend a test group of readers. These readers shouldn't be authors. They can check if they understand the explanations and descriptions. The best is to do that during filling the glossary and not only at the end of this phase.

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3.2 Term structure

A glossary consists of a set of terms and a description to each term. But you can request more structured information (attributes) for each term:

Term Attribute	Description
Created	Date when entry was created (automatically in SharePoint)
Last modified	Date of last change (automatically in SharePoint)
Created by (author)	Who has this entry created (automatically in SharePoint)
Modified by	Who changed this item the last time (automatically in SharePoint)
Reviewer	Who has reviewed or approved this definition
Last reviewed	When was the last review of this term definition
Source	Could be a person but also a link or a book, for example Wikipedia. Not automatically identical with author.
Contact	Who is responsible for this entry or a contact who can give you more information about that topic in your company. Not automatically identical with author.
Abbreviation	A short phrase for this term. There can be multiple.
Synonym	Other terms which mean the same thing
Experiences	Who made experiences or what kind of experiences have we made in our company
Related	Other terms which are in relation to this one
Rating	As an extension, you can add a rating function to your glossary
Category	Additional to an alphabetic order you can use a categorie system.

3.3 Approval

In very specific or important glossaries it makes sense to review the entries to avoid mistakes.

There are different ways for an approval:

Approval method	Description
One group	There is only one group of authors. The same group is also in the role of approvers. Each author can

	approve each entry of another author but not his own entries.
	This makes sense in a homogeneous group.
Two groups	There are two different groups. One for the authors and the other one for approver.
Different groups	The "one group" or "two group" system can be extended to several groups per different topic.
Person to person	Each author gets assigned an approver. The approver can be also be an author.

4 PROMOTION AND "SELLING"

You should not forget to "sell" your glossary within your organization or team.

Team

In case of a team or project glossary, the communication isn't the problem. You can easily reach the team members and you know all of them:

- Convince the team that the glossary is necessary and useful to avoid misunderstanding and helping to "speak" one language. Do that before you start with your project.
- Correct team members if they use terms in wrong meaning. This emphasis the importance of the glossary.
- Report about the progress of the glossary in your team meetings.

Organization

To sell a glossary in your organization is much more difficult because you can't speak to all colleagues at once.

- First, define a core audience for your glossary. This provides the basis for all further activities or other social media technologies used in your company.
- Use the established communication ways of your company: News, Newsletters or also blogs to announce of your project and to report the progress.
- Announce a release date for the glossary.
- Depending on your audience you can also offer the option of suggestions.
- A more modern way is the gamification.

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5 PRODUCTION AND MAINTENANCE

Depending on the glossary, in some cases it is useful to start with a pilot phase. In that phase you can test the comprehensibility of the term description and navigation.

If you then open up the glossary to all readers, your project shouldn't end there. We always recommend to make an ongoing plan already in the first phase of you project.

The goals of the further phases are:

- Add new terms
- Improve and review the term definitions and the other information of the terms
- Increase the use of the glossary

The methods in this phase are

- Keep reporting in your social media of your company
- Tell success stories
- Encourage users to send feedback and answer to that feedback
- From a more technical point of view, you should also watch statistical numbers, such as the increase of terms and user access reports.