



Checklist for Formatting and Editing Teaching Cases and Teaching Notes

Sl. No.	Category	No.	Activity	Yes or No?
Header and Footer				
1		1	Is the case name in the right font and font size?	
2		2	Are the case number and teaching case number correct?	
3		3	Are the page numbers in the right order? Are they starting at 1?	
4		4	Are there any page numbers cropping up as 0 somewhere in the middle of the pages?	
5		5	Are the font and font size for all contents in headers and footers correct?	
6		6	Are the foot notes in the correct font and font size? Are they matching with the superscript numbers?	
Disclaimer and Copyright				
7		1	Is the right disclaimer applied to the case in terms of the case using primary sources or secondary sources?	
8		2	Is the company release form signed in case of a teaching case using secondary sources for information? Have you checked with faculty?	
9		3	Has the right year been used for the copyright information?	
10		4	Have the legal requirements been met as per the disclaimer and copyright information for the case?	
Headings				
11		1	Are the font and font size correct for every heading type?	
12		2	Are the subheadings consistent? Are the format (e.g., indentation and font) and numbering correct?	
Exhibits and Figures				
13		1	Is the 'Source' for Exhibits in bold, and does it follow the font and font size requirements?	
14		2	Is there any exhibit/figure heading at the bottom of a page with the exhibit/figure on the next page?	
15		3	Are there gaps in other fonts or sizes between the exhibit and the source information?	
16		4	If the source of an exhibit is a 'company document' for a case using secondary information, ensure that there are no chances of legal complications.	
17		5	Are the Exhibit, Exhibit number and Exhibit title in bold? Are they in the correct font and font size?	
18		6	Are the Exhibit, Exhibit number and Exhibit title aligned according to the template?	
19		7	Have you checked formatting around a 'table' or 'exhibit' after it has been pasted from another source as per the template?	
Document Editing				
20		1	Have the HBPE guidelines been followed?	
21		2	Are the case and TN formatted as per the template?	
22		3	Do you have final author approval?	
23		4	Have all comments been deleted after the final edits?	
24		5	Are titles of case, teaching note and CIS the same?	
25		6	Has the appropriate file naming convention been followed?	
26		7	Is the teaching case written in past tense? Is the teaching note written in present tense?	
27		8	Is there any typo or spelling error, especially in names of protagonists?	

28		10	Is there any typo error introduced during the editing process? Have you double checked after you type in anything?	
29		11	Are there any extra spaces/gaps between words in the case and TN? Have you eyeballed the spaces when going through the document to check for any wider gaps?	
30		12	Are the hyperlinks provided in the document working? Do they take the reader to the intended page?	
31		13	Does any hyperlink show up as orange or any other colour when clicked?	
32		14	Have you checked for grammatical errors, wrong sentence structures and word choices? Have you checked for subject-verb agreement in each sentence?	
33		15	Have you made sure to avoid wordiness like 'very', 'in order to', 'so as to', etc.?	
34		16	Have the jargons and other terms been explained in the footnotes or within the text?	
35		17	Have you checked for any slang/vernacular and sexist language that may have been used in the case?	
36		18	Have you ensured that 'he' or 'she' is not used when you are not sure about the gender for a particular quote?	
37		19	Have you checked for redundancies such as 'the reason why, was because', 'clearly evident', etc.?	
38		20	Are there any time-specific sentences in the case like, '3-4 months ago' or 'recently there was a change in the company policy'?	
39		21	Is the case written in the active voice? (There may be exceptions; refer to the HBPE guidelines)	
40		22	Are there any false words? For e.g., using 'form' where it should have been 'from'	
41		23	Have you ensured there are no serial offenders? For e.g., using 'it's' where it should have been 'its', or using 'their' where it should have been 'there'	
42		24	Do you have full forms for all the acronyms used in the document?	
43		25	Has the company been named appropriately everywhere? For e.g., 'Yahoo!' and not 'Yahoo'.	
44		26	Have the em dash, en dash and other dashes been used correctly and consistently throughout the document?	
45		27	Are there errors related to US vs. UK English?	
46		28	Are the sources specific? For e.g., for an Annual Report, just saying annual report isn't enough. It needs to have a link in case of a secondary source case and company document for a primary source case	
47		29	Is there consistency in how acronyms and their expansions have been used? For instance, if the expansions are capitalized, are they capitalized for all acronyms used?	
48		30	Have the specifications regarding using numerals or numbers in words been followed?	
49		31	Have you looked at the images/exhibits/figures used for clarity? Did you check with the author in case the images aren't clear?	
Quotations				
50		1	Has quotation indentation been followed as per HBPE guidelines and IIMB templates?	

51		2	Did you ensure that all quotation marks are paired and there are no double quotation marks within double quotation marks?	
End notes				
52		1	Did you check superscripts against footnotes or endnotes to be sure they correspond and that none are missing?	
Tables				
53		1	Are numbers in the table right-aligned?	
54		2	Is text in the table left-aligned?	
55		3	Are the decimal points (if any) consistent?	
56		4	Is the data in the fields crisp? For instance, if a column shows currency data in dollars, instead of writing \$ every time in the fields, ensure 'in \$' is mentioned once in the column title.	
57		5	If a financial year (FY) isn't over and data is presented covering that FY, have you ensured whether (till 'date') has been mentioned?	
Punctuation				
58		1	Do all paragraphs have ending punctuation?	
59		2	Are colons and semi-colons used in an appropriate manner?	
Widows and Orphans				
60		1	Are there any widows (a single word at the beginning of a page)?	
61		2	Are there any orphans (a single word at the end of a paragraph)?	
Final checks				
62		1	Check final pagination	
63		2	Check final formatting	
64		3	Check if the hyperlinks are working in the PDF document	
65		4	Ensure page margins are correct as per the template	
66		5	Run a final spell check to catch any typos	
67		6	Is a balanced flow maintained from one paragraph to the next paragraph?	