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Before You Begin

This checklist is an official document to help you confirm that your product (either developed for or provided to Microsoft) and its components are compliant before release to publication. By completing and signing off on this checklist, you and Microsoft have documented that your content meets Microsoft corporate compliance regulations.

Is the Compliance Checklist required? It is intended to help each content producer and/or manager ensure content meets Microsoft corporate requirements that help avoid risk. Submitting a completed and signed checklist is a great way to record compliance for Microsoft and leave evidence for subsequent releases and/or sustained engineering (SE) i.e., no new checklist. It’s also a great way to communicate with the Compliance team about your needs.

This checklist also includes links to [compliance training](https://microsoft.sharepoint.com/teams/learning/GCL/Pages/Home.aspx?TAB=4%3ACompliance) to support documenting compliance. These resources are helpful for new releases and to help simplify subsequent releases and SE.

This Compliance Checklist targets highlights from the 12 compliance requirements categories to help familiarize users with high-risk situations. You can find the full list of topics and requirements in the [Requirements Catalog](https://liquid.microsoft.com/Web/Home/Requirements).

Note that **all content types are included in all 3 categories** *(licensing, accessibility, and global readiness).* Each category is addressed in separate sections later in this document. Also know that while this checklist focuses on licensing, accessibility, and global readiness, your product and all its individual components are subject to all the requirements and can be audited to verify compliance.

**Content types** included in this checklist include:

|  |  |  |
| --- | --- | --- |
| * Videos | * Code | * Demonstrations |
| * Word documents | * Open and closed caption files | * Simulations |
| * Excel spreadsheets | * XML and HTML files | * People and company names |
| * PPT files | * VTT and TTML files | * Graphics and pictures (people included) |
| * PDFs | * URLs | * Software |

**IMPORTANT: This checklist is not a training document.** If you are unfamiliar with compliance for licensing, accessibility, global readiness, or other compliance topics, please refer to the [Compliance training documentation](https://microsoft.sharepoint.com/teams/learning/GCL/Pages/Home.aspx?TAB=4%3ACompliance) *before you begin* completing this checklist. For assistance, please contact the [WWL Compliance team](mailto:wwlcompliancesupp@microsoft.com?subject=I%20have%20a%20compliance%20question) or refer to the appendices for useful resources and contacts.

Requirements

It is recommended that you complete this checklist for all Worldwide Learning content types and components and have the content owner sign off before the product and its components are submitted to release for publication.

Record permissions

If your product contains any third-party intellectual property (IP) or content as described in sections below, you must provide a record of permissions and store the permission records with the course content. Documentation includes licenses, written approvals, transcripts, and copies of Terms of Use agreements. Please select the Permission Provided check box to indicate there is supporting documentation. Then please complete the *Name and location of permission documentation* form at the end of this document. For your reference, there is example permissions documentation in Appendix B.

Exceptions

If you are unable to meet or adhere to any accessibility requirements in this checklist due to constraints with time to market, available resources, budget impact, market life, or other issues, you may request an exception or VPAT (Voluntary Product Accessibility Template) from the [WWL Compliance team](mailto:wwlcompliancesupp@microsoft.com?subject=I%20have%20a%20compliance%20question). They will help you with any questions or needs that you have.

Sign off

When the checklist is complete, please add your signature to the sign-off section as a record of your responsibility on the checklist’s accuracy. Then place the checklist in your team’s content-management system or in the Visual Studio (TFS) instance for your content. When you submit this checklist, it's subject to review by the [WWL Compliance team](mailto:wwlcompliancesupp@microsoft.com?subject=I%20have%20a%20compliance%20question).

Content owner information

|  |  |  |  |
| --- | --- | --- | --- |
| Please complete all fields in this section | | | |
| **Your name:** *Lino Tadros* | | **Your email alias:** lino@solliance.net | |
| **Your role:** (content owner, PjM, etc.) Reviewer of the October Test/Fix cycle | |  | |
| **FTE content owner/Microsoft business lead name**: (if different from above) Select here to add text. | | **FTE email alias:** *Add email alias* | |
| Is Microsoft the sole owner of this learning product?  Yes  No | | **If no,** name and contact info for content owner: *Add content owner name and email* | |
| **Describe product:** Microsoft Cloud Workshop – Intelligent Analytics – October 2018 | | EXAMPLE  **Describe product:** 20334 MOC course, including student and instructor materials, VMs | |
| What type of product is this? (Select all that apply) | Book  Online courseware  Instructor-led courseware  Downloadable courseware asset  Other downloadable asset (please list) Material for Workshops over Github | | Self-Assessment  Online courseware with virtual lab  Video  Virtual machine(s) |
| List all distribution channels for this content: (Select all that apply) | Microsoft website(s)  Volume Licensing  Enterprise  Academic | | Third-party websites (include hyperlinks)  *Select here to add text.*  Retail via the Microsoft Store  Other (please describe) Github |

Licensing

| LICENSING CHECKLIST APPLIES TO ALL CONTENT ASSETS AND FILE TYPES | | **YES** | **NO** | **Permissions in appendix? Required** |
| --- | --- | --- | --- | --- |
| 1. | Does your product contain any third-party intellectual property (IP) or content?  **IP/content includes**: Non-Microsoft-owned URLs, embedded content, screenshots, iFrames, icons, names, images, quotes, photos, artwork, text, PPTs, videos, music, studies, sounds, research, statistics, surveys, logos, trademarks, software, images on clothing, screenshots, identifiable people or property visible in the background, etc.  **If yes,** then please check the box in the right-most column and use the form at the end of this Checklist to point reviewers to the permission source files. In that form, add the name and location of the documentation in which you list each software license included in your product, the list of all third-party software, where you obtained the software, and the URL to each software license. |  |  |  |
| 2. | Does your product include a person’s name, image, photograph, illustration, signature, video, and/or audio recording of a person? For example, are you using a person’s picture off the Internet?  **If yes,** then please check the box in the right-most column and use the form at the end of this Checklist to point reviewers to the permission source files. |  |  |  |
| 3. | Does your product contain downloadable third-party software, code, sample code, or tools? Does your product contain any third-party software, such as community or retail software?  **If yes,** then please contact the [WWL Compliance team](mailto:wwlcompliancesupp@microsoft.com?subject=I%20have%20a%20compliance%20question) , and they will assist you |  |  |  |
| . | Does your product contain a self-extracting code, executable, or application? If so, you must meet specific guidelines. **If yes**, then please contact the [WWL Compliance team](mailto:wwlcompliancesupp@microsoft.com?subject=I%20have%20a%20compliance%20question), and they will assist you |  |  |  |
| 7. | Does your product contain any open-source software (OSS) components?  **If yes**: Please check the box in the right-most column and use the form at the end of this Checklist to point reviewers to the permission source files. |  |  |  |
| 8. | Did you verify that your product does not contain any Microsoft confidential information (e.g., screenshots of pre-release software?). For more information, see [Confidential Information](https://microsoft.sharepoint.com/sites/lcaweb/Home/Business-Conduct-and-Compliance/Confidential-Information/Confidential-Information).  **If no or unsure:** Verify that there is no confidential information and if there is, remove it from your product. |  |  |  |
| 9. | Have you read the ‘Create inclusive video’ and ‘Create inclusive Office files’ documents in the [Compliance Inclusive Library](https://microsoft.sharepoint.com/teams/learning/GCL/Pages/Home.aspx?TAB=4%3ACompliance) and applied any additional licensing requirements? |  |  |  |

Accessibility

| ACCESSIBILITY CHECKLIST APPLIES TO ALL CONTENT ASSETS AND FILE TYPES | | YES | NO |
| --- | --- | --- | --- |
| 1. | Did you run the Office Check Accessibility tool on all the Office components in your product?  **If no:** Run the tool and fix all errors. For more information refer to the [Accessibility Checker](https://microsoft.sharepoint.com/teams/msenable/Pages/AccessibilityChecker.aspx) |  |  |
| 2. | Does your product have alternative text (alt-text) for all objects such as pictures, clip art, charts, tables, shapes, SmartArt, and embedded objects?  **If no:** Add alt-text to the appropriate components. For more information on alt-text, Visit the [Compliance Inclusive Library](https://microsoft.sharepoint.com/teams/learning/GCL/Pages/Home.aspx?TAB=4%3ACompliance) for information on creating inclusive content. |  |  |
| 4. | Does your product have open or closed captions for all videos or live/real-time synchronized media that are owned by or licensed to Microsoft?  **If no:** Add captions for all synchronized media. For more information on ordering and adding captions, contact the [WWL Compliance team](mailto:wwlcompliancesupp@microsoft.com?subject=I%20have%20a%20compliance%20question); they will assist you.  Does your product offer a downloadable transcript for all videos or live/real-time synchronized media that are owned by or licensed to Microsoft?  **If no:** Inclusion of a downloadable transcript is not mandatory at this time but is strongly recommended. |  |  |
| 5. | Does your product use a meaningful sequence, in other words is the reading order correct for an accessibility screen reader?  **If no or you are unsure**: Visit the [Compliance Inclusive Library](https://microsoft.sharepoint.com/teams/learning/GCL/Pages/Home.aspx?TAB=4%3ACompliance) for information on creating inclusive Office files. |  |  |
| 6. | Does your product use the correct colors and contrast minimums for all learners?  **If no or you are unsure**: Visit the [Compliance Inclusive Library](https://microsoft.sharepoint.com/teams/learning/GCL/Pages/Home.aspx?TAB=4%3ACompliance) for information on creating inclusive content. |  |  |
| 7. | Does your product use the correct size and color text and font for all learners?  **If no, or you are unsure**: Visit the [Compliance Inclusive Library](https://microsoft.sharepoint.com/teams/learning/GCL/Pages/Home.aspx?TAB=4%3ACompliance) for information on creating inclusive content and the accessibility [guidelines in the Requirements Catalog.](https://liquid.microsoft.com/Web/Views/View/59001) |  |  |
| 8. | Have you read the ‘Create inclusive video’ and ‘Create inclusive Office files’ documents in the [Compliance Inclusive Library](https://microsoft.sharepoint.com/teams/learning/GCL/Pages/Home.aspx?TAB=4%3ACompliance) and applied any additional accessibility requirements? |  |  |

Global readiness

| GLOBAL READINESS CHECKLIST APPLIES TO ALL CONTENT ASSETS AND FILE TYPES | | YES | NO | Review requested |
| --- | --- | --- | --- | --- |
| 1. | **Did you run PoliCheck on all content in your product and provide signoff in the PoliCheck results sheet?**  **If yes:** Provide the name and location of the Policheck results for your product in the column to the right.  **If no**: Run [PoliCheck](http://gpweb/Pages/PoliCheck) on all content in the product including Microsoft Word and PowerPoint files, PDFs, closed-caption files, any other text-based content, and code. Also, the content owner must resolve all positive severity 1 and 2 hits and sign off on the hits in the PoliCheck results sheet. Additionally, if your content is in a language other than English, you must run PoliCheck in both English and the target language.  **IMPORTANT**: All resolution or non-resolution of severity 1 hits must be sent to the [WWL Compliance team](mailto:wwlcompliancesupp@microsoft.com?subject=I%20have%20a%20compliance%20question) for review and approval. |  |  |  |
| 2. | **Did you review all imagery, audio, and video for geopolitical risk in all target markets in which your team will release your product? Did you consider current events to your assessment?**  **If you’re not sure: Review your product and verify that there is no geological risk using the** [Global Readiness requirements for imagery, audio, and video](https://microsoft.sharepoint.com/teams/celaGlobalReadiness/Pages/ImageAudioVideo.aspx)**. Failure to adequately review content prior to release can expose Microsoft to significant risk.** |  |  |  |
| 3. | Does your product contain country/region names?  **If yes: Verify that** that the country/region, capital, major city, and continent, and multinational region references in content, lists and fields are labeled accurately per [Global Readiness standards](https://microsoft.sharepoint.com/teams/celaGlobalReadiness/Lists/CountryRegion/CountryRegionList.aspx). |  |  |  |
| 4. | Did you use a pre-approved template from the [Global Readiness website](https://microsoft.sharepoint.com/teams/celaGlobalReadiness/Pages/geography.aspx) for any images of geography, maps, or flags, in your product?  Any images of geography, maps, or flags must meet Microsoft’s requirements on the Global Readiness website. If they do not meet those requirements, the images must be reviewed and approved by the [Global Readiness team](https://microsoft.sharepoint.com/teams/celaGlobalReadiness/Pages/Inquiry.aspx).  **If no,** then please select the right-most column to request a Compliance review and submit to the [WWL Compliance team](mailto:wwlcompliancesupp@microsoft.com?subject=I%20have%20a%20compliance%20question). Visit the [Compliance Inclusive Library](https://microsoft.sharepoint.com/teams/learning/GCL/Pages/Home.aspx?TAB=4%3ACompliance) for information on creating inclusive content. |  |  |  |
| 6. | Did you remove all hidden data and personal information from text documents (including PowerPoint, Word, Excel, and PDF files)?  If no, refer to [Remove hidden data and personal information by inspecting documents](https://support.office.com/en-us/article/Remove-hidden-data-and-personal-information-by-inspecting-documents-356B7B5D-77AF-44FE-A07F-9AA4D085966F?ui=en-US&rs=en-US&ad=US). |  |  |  |
| 7. | Are all people names, company names, and addresses fictitious per the [Microsoft corporate requirements](https://microsoft.sharepoint.com/sites/lcaweb/Home/Copyrights-Trademarks-and-Patents/Trademarks/Fictitious-Names)?  If no: Create fictitious names per the guidelines. Document the names and add the name and location of the document in the column to the right. |  |  |  |
| 8. | Have you read the ‘Create inclusive video’ and ‘Create inclusive Office files’ documents in the [Compliance Inclusive Library](https://microsoft.sharepoint.com/teams/learning/GCL/Pages/Home.aspx?TAB=4%3ACompliance) and applied any additional global readiness requirements? |  |  |  |

Sign off

As the content owner, I sign off that all the information in this document is accurate and that all components in my product meet the requirements presented in the checklist OR I have received and submitted documented permission OR have an exception from the WWL Compliance team.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Lino Tadros | 10/13/2018 | Enter name and alias | Click or tap to enter a date. | Choose an item. |
| Signature | Date | Compliance reviewer | Date | Compliance status |

Signed

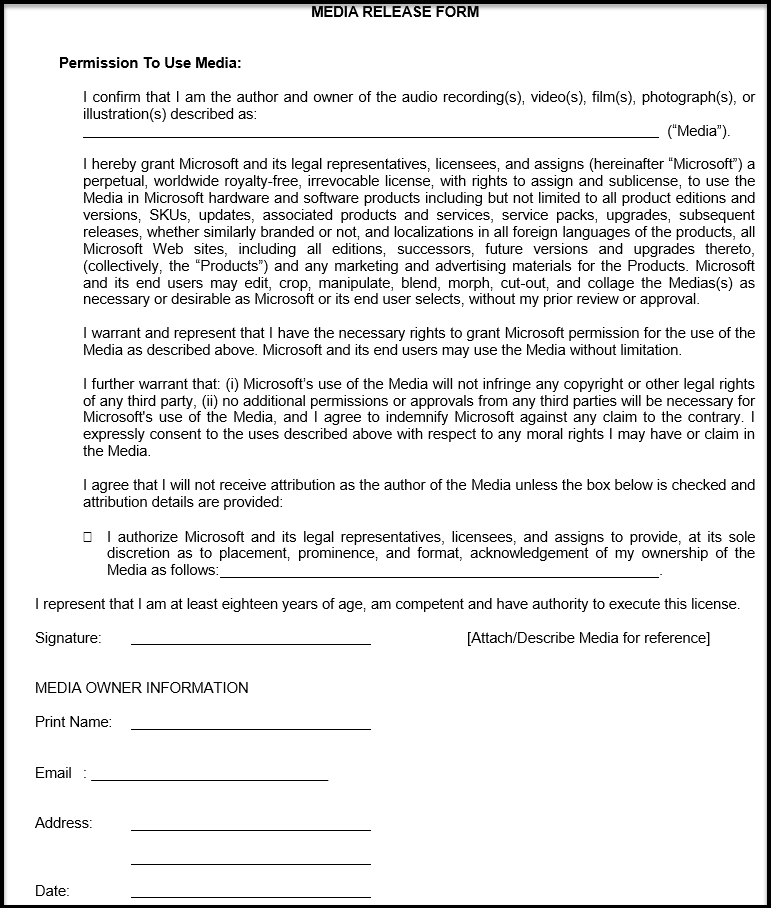
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Appendix A: Permissions log

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Describe content asset | License or Global Readiness topic?  (Can be both) | Where will we find it in the content (File, page, and location) | Where is the permission doc filed (Filename and location) | Approved  Compliance team only |
| *EXAMPLE Photo of beach scene with people in swim suites in front of Waikiki Hilton sign.* | Licensing  Global Readiness | **Filename**: *Module 2.pptx*  Page/slide/worksheet location:Slide 34  **File location**: $/ILT/Courses/ENG/90001A/Source/Powerpnt/ | **Filename**: 90001A Hilton media release  **File location**: $/ILT/Courses/ENG/90001A/Compliance | **Reviewed by** Enter alias  **Approved by** Enter alias |
| *Briefly describe content* | Licensing  Global Readiness | **Filename**: *Type filename*  Page/slide/worksheet location: *Type content’s* location  **File location**: Type file’s location | **Filename**: *Type filename*  **File location**: Type file’s location | **Reviewed** by Enter alias  **Approved** by Enter alias |
| *Briefly describe content* | Licensing  Global Readiness | Filename: *Type filename*  Page/slide/worksheet location: *Type content’s* location  File location: Type file’s location | Filename: *Type filename*  File location: Type file’s location | Reviewed by Enter alias  Approved by Enter alias |
| *Briefly describe content* | Licensing  Global Readiness | Filename: *Type filename*  Page/slide/worksheet location: *Type content’s* location  File location: Type file’s location | Filename: *Type filename*  File location: Type file’s location | Reviewed by Enter alias  Approved by Enter alias |
| *Briefly describe content* | Licensing  Global Readiness | Filename: *Type filename*  Page/slide/worksheet location: *Type content’s* location  File location: Type file’s location | Filename: *Type filename*  File location: Type file’s location | Reviewed by Enter alias  Approved by Enter alias |
| *Briefly describe content* | Licensing  Global Readiness | Filename: *Type filename*  Page/slide/worksheet location: *Type content’s* location  File location: Type file’s location | Filename: *Type filename*  File location: Type file’s location | Reviewed by Enter alias  Approved by Enter alias |

Appendix B: Permission documentation example

If your product contains any third-party intellectual property (IP) or content as described in this checklist, you must record all permissions and provide the required documentation. Documentation includes, but is not limited to: licenses, written approvals, transcripts or copies of Terms of Use agreements. The name and location of your documentation file(s) should be in the *Name and location of permission documentation* column of each appropriate section. An example [media release form](https://microsoft.sharepoint.com/sites/LCAWebAuthoring/LSWDocuments/Media_And_Person_Property_Release_Form_8_11_Form_CTP.pdf) is below.



Appendix C: Useful contacts and resources

Table 1: Contact information by topic

|  |  |
| --- | --- |
| Topic | Contact info |
| Compliance | [WWLComplianceSupp@microsoft.com](mailto:WWLComplianceSupp@microsoft.com) |
| Accessibility | [WWLAccessibilitySupp@microsoft.com](mailto:WWLAccessibilitySupp@microsoft.com) |
| Image review | [WWLImageReview@microsoft.com](mailto:WWLImageReview@microsoft.com) |

Table 2: Links to additional references by topic

|  |  |
| --- | --- |
| Topic | Link |

|  |  |
| --- | --- |
| Accessibility | [Accessibility Checker](https://microsoft.sharepoint.com/teams/msenable/Pages/AccessibilityChecker.aspx) |
|  | [Quick Reference Guide to Section 508 Requirements and Standards](https://section508.gov/content/learn/standards/quick-reference-guide) |
|  | [21st Century Communications and Video Accessibility Act (CVAA)](https://www.fcc.gov/consumers/guides/21st-century-communications-and-video-accessibility-act-cvaa) |

|  |  |
| --- | --- |
|  | [Understanding WCAG Accessibility Guidelines](http://www.w3.org/TR/UNDERSTANDING-WCAG20/) |
|  | [Multimedia accessibility considerations](http://accessibility.psu.edu/multimedia/) |
|  | [Microsoft Accessibility](https://www.microsoft.com/en-us/accessibility/default.aspx) (to download accessible Office templates) |
|  | [Office Accessibility Center](https://support.office.com/en-us/article/Office-Accessibility-Center-Resources-for-people-with-disabilities-ecab0fcf-d143-4fe8-a2ff-6cd596bddc6d?ui=en-US&rs=en-US&ad=US) |

|  |  |
| --- | --- |
| Accessibility: visual considerations | [Visual Studio blog on light and dark themes](https://blogs.msdn.microsoft.com/visualstudio/2012/05/29/visual-studio-dark-theme/) |

|  |  |
| --- | --- |
|  | [Colour Contrast Analyser by the Paciello Group](https://developer.paciellogroup.com/resources/contrastanalyser/) |

|  |  |
| --- | --- |
| Accessibility: audio considerations | [CELA Quick Guide – Accessibility: Video Player Basics](https://microsoft.sharepoint.com/teams/msenable/Documents/Forms/AllItems.aspx?id=/teams/msenable/Documents/LCA/Quick%20Guides/MSENable-QuickGuide-VideoPlayer.docx&sortField=Modified&isAscending=false&parent=/teams/msenable/Documents/LCA/Quick%20Guides) |
| Licensing | [Guidelines for using photographs in ads & products](https://microsoft.sharepoint.com/sites/LCAWeb/Home/Copyrights-Trademarks-and-Patents/Copyrights/Third-Party-Content/Using-Photographs-in-Advertising-Products) |

|  |  |
| --- | --- |
|  | [Finding approved sources of content to use](https://microsoft.sharepoint.com/sites/LCAWeb/Home/Copyrights-Trademarks-and-Patents/Copyrights/Third-Party-Content/Using-Content) |
|  | [Using Creative Commons content](https://microsoft.sharepoint.com/sites/LCAWeb/Home/Copyrights-Trademarks-and-Patents/Copyrights/Third-Party-Content/Using-Creative-Commons-Content) |
|  | [Media Licensing Knowledge Base](https://microsoft.sharepoint.com/teams/MediaAcquisition/Pages/knowledgeBase.aspx) |

|  |  |
| --- | --- |
| Global Readiness | [Global Readiness portal](https://microsoft.sharepoint.com/teams/celaGlobalReadiness/Pages/Home.aspx) |

|  |  |
| --- | --- |
|  | [Geographic Issue Specs](https://microsoft.sharepoint.com/teams/celaGlobalReadiness/Lists/Geographic%20Issue%20Specs/Geographic%20Issue%20Specs.aspx) is the definitive guideline for how to handle sensitive geographic areas in Microsoft content. |
|  | Guidance for creating or using [globes, maps, or images depicting continent, country/region,](https://microsoft.sharepoint.com/teams/celaGlobalReadiness/Pages/MapsandGlobes.aspx) or administrative borders. |
|  | [Integrating Bing Maps](https://microsoft.sharepoint.com/:w:/r/teams/celaGlobalReadiness/_layouts/15/WopiFrame.aspx?sourcedoc=%7BF9DB9AD8-66FA-4675-90AA-8C6C67A400E5%7D) into a product or service. |