Documentation Review Checklist

[Project/Product Name]

Month 20YY

Version X.XX

# Purpose

Effective documentation reviews help catch errors not only in documentation, but in the products themselves. Better products and supporting material reduce production costs and calls to the help center along with making customers happier.

To that aim, the documentation review checklist should be completed by all SMEs and copy reviewers to ensure accuracy, clarity, and consistency within each document.

# How to Use this Template

Here are some tips for using this template and completing a documentation review.

## Customize the Checklist

Not all sample line items in the checklist will apply to your specific document or review needs. Customize the checklist items to your document so you can capture specific feedback and improve the overall communication.

The front matter/overview text could include a purpose statement, document description, target audience, scope, instructions for use, etc. The body or procedure area could include procedure steps, instruction sets, and other body text in your document.

You can easily add, modify, copy, and remove text as it applies/relates to each document. For example, you may want to add rows to the Procedure/Body Text section to capture reviews of all subsections of a lengthy procedure. Add rows by clicking to the right of the table, then pressing enter.

## Prepare Your Reviewers

Create a clear message on what you want reviewers to review (then you can avoid the dawdling on unfinished or unformatted sections.)

You can customize this checklist and use it for different purposes. Use this checklist in a technical review meeting to capture changes as the group discusses them. Or, send the checklist to individual reviewers along with a deadline.

If you are conducting a review meeting, send the checklist to all reviewers 1-2 days in advance of the meeting to familiarize them with the review needs.

|  |
| --- |
| **Documentation Review Checklist** |
| **Document Title:** | **Review Date:** |
| **SME Reviewer(s):** | **Copy Reviewer(s):** |
| **Section** | **Item** | **Y** | **N** | **Comments/Changes** |
| **Front Matter/Overview** | The title page includes required company information (e.g., logo, company name, project and document title). |[ ] [ ]   |
|  | The purpose of the document is clear and complete. |[ ] [ ]   |
|  | All known audiences/customers/users are described thoroughly and accurately. |[ ] [ ]   |
|  | The scope of the document is accurate and complete. |[ ] [ ]   |
|  | Product version numbers and release dates are accurate. |[ ] [ ]   |
|  | The table of contents reflects correct page numbers and section names. |[ ] [ ]   |
| **Procedure/****Body Text** | All steps in the procedure are accurate and complete. (For short procedures.) |[ ] [ ]   |
|  | -or- Step 1 text and screen shots are accurate and complete. (For lengthier procedures and corresponding screen shots.) |[ ] [ ]   |
|  | -or- Section 1.1 text is accurate and complete. (For sections of body text that are not broken into steps.) |[ ] [ ]   |
|  | All corresponding screen shots accurately display the current version of the software/clearly relate to the step text. |[ ] [ ]   |
|  | All charts, graphs, and diagrams are labeled accurately and consistently. |[ ] [ ]   |
|  | All sensitive or proprietary data has been redacted or masked. |[ ] [ ]   |
|  | All safety, privacy, and/or other details are specified. |[ ] [ ]   |
| **Copy Review** | Company-specific product names and industry terminology used consistently throughout the document (e.g., proper nouns capitalized). |[ ] [ ]   |
|  | Acronyms are spelled out completely in the first instance. |[ ] [ ]   |
|  | All hyperlinks have been tested and work. |[ ] [ ]   |
|  | The document flow and structure logical for the audience to follow. |[ ] [ ]   |
|  | Spelling and grammar check are complete. |[ ] [ ]   |
|  | The document text is concise and clear. |[ ] [ ]   |
| **Standards and Style Review**  | Header contains standard information (e.g., logo, document title). |[ ] [ ]   |
|  | Footer contains standard information (e.g., confidentiality statement, page number, date). |[ ] [ ]   |
|  | Headings match standard font, color, size styles. |[ ] [ ]   |
|  | Body text matches standard font, color, size styles. |[ ] [ ]   |

# Reviewer Instructions

Please complete this checklist and return to [name] by [date].

Please focus on [sections 1-3] during this review.

Click the check box in the Y column if the item is complete and accurate. Provide any supporting comments in the Comments/Changes column.

Click the check box in the N column if the item is incomplete or inaccurate. Provide the recommended change in the Comments/Changes column.

# Documentation Team Action Items

*If you want to compile all action items into the same document, here are some ideas/guidelines.*

Based on the document review, the following changes need to be made by [date]:

* List item
* List item

The following changes require further discussion with SMEs, managers, and/or other team members:

* List item
* List item

The following recommended changes will not be made because:

* List item
* List item