

Guidelines for Technical Edits

The purpose of the technical edit is to ensure that all materials produced by the Documentation department are as complete and technically accurate as possible. Each document will also pass through a peer edit by a member of the Documentation department after the technical edit is complete, so as a technical editor you do not need to be concerned with issues of style and grammar. Your main focus should be on the technical accuracy of the document.

The first step, of course, is simply to check the document for any errors. We need to make sure we have correctly described each feature of the software, as well as the overall design and purpose of the forms and systems we are discussing.

Beyond checking for errors, however, we want the documentation we produce to be as helpful to the user as possible. For the purposes of the technical edit, this means not only checking for inaccuracies, but asking whether the document has all the information that is necessary to use the software successfully. This includes questions such as the following:

- Does the document make the purpose of each form, tab and element sufficiently clear?
- Does the documentation clearly explain the relationships between different forms within a system, or between different elements on a form?
- Are there things that the software is doing behind the scenes in response to the user's actions that the user needs to understand?
- If the documentation is describing a display-only field or display grid, is it making it sufficiently clear where the information displayed is coming from?
- Does the documentation give clear and helpful examples when explaining new or difficult concepts?
- Are any terms that are specific to the software adequately defined?
- If the documentation is describing a process, is it giving the user the information they will need not only to complete the process, but also to understand why they are doing what they're doing?
- For case studies, is the scenario realistic, and does the case study describe the best use of the software in the described work process?

This list is not meant to be exhaustive. It merely provides some examples of the kinds of issues we want to address in the documentation, and for which we rely on the expertise of our technical editors.