

# Sample 2-Part Document Review Checklist (Part 1: In-Process)

**PART 1:  
Reviewing  
In-Process  
Documents**

Use **Part 1** of this checklist for all passes necessary to review **in-process draft** documentation, which may comprise individual chapters of a larger document, or early drafts of a standalone one. Multiple review passes can be made in any order. Steps 1–3 are administrative reviews; steps 4–6 require more technical familiarity.

Whenever possible, use change bars to identify any changed sections.

Step	Description	Actions	✓
1	<b>Screen shots</b>	<ul style="list-style-type: none"> <li>• Compare screen images to on-screen versions.</li> <li>• Compare names and text to on-screen versions.</li> <li>• Check the clarity of images in printed form.</li> </ul>	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
2	<b>Figure identification</b>	<ul style="list-style-type: none"> <li>• Verify that each caption relates to its figure.</li> <li>• For dialog boxes, verify that the complete path or menu sequence needed to open a dialog box appears in the caption or just above the figure. <b>Example: System Manager &gt; Set Up Users.</b></li> </ul>	<input type="checkbox"/>
			<input type="checkbox"/>
3	<b>Section headings</b>	<ul style="list-style-type: none"> <li>• Check that chapter or section headings appear correctly in running header/footer information.</li> <li>• Check that heading levels seem logical and reasonably consistent.</li> </ul>	<input type="checkbox"/>
			<input type="checkbox"/>
4	<b>Procedures</b>	<ul style="list-style-type: none"> <li>• Verify accuracy and readability of each step.</li> <li>• Verify that the steps are in the right sequence and that the procedure as a whole is complete.</li> </ul>	<input type="checkbox"/>
			<input type="checkbox"/>
5	<b>General content</b>	<ul style="list-style-type: none"> <li>• Check overall accuracy and completeness.</li> <li>• Check overall understandability and usability.</li> <li>• Note any spelling errors, especially in terms or acronyms that a spelling checker might miss.</li> <li>• Verify any questionable style issues against the conventions listed in the following sources:               <ul style="list-style-type: none"> <li>• The “Typeface Conventions”</li> <li>• The “Documentation Style Guide”</li> <li>• Microsoft’s <u>Manual of Style for Technical Publications</u></li> </ul> </li> </ul>	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
6	<b>Document interfaces</b>	<ul style="list-style-type: none"> <li>• Check the document against the others in the library to be sure all of its document interfaces are working correctly. Access documents at: <a href="http://www.xyzcompany.com/documentation.html">www.xyzcompany.com/documentation.html</a></li> </ul>	<input type="checkbox"/>

After the draft document is complete, use this **Part 1** checklist again in addition to the **Part 2** checklist to review the final version.

## Sample 2-Part Document Review Checklist (Part 2: Completed)

**PART 2:  
Reviewing  
Completed  
Documents**

Use this **Part 2** checklist *in addition to Part 1* to review the **final** documentation. Multiple passes can be made in any order. Steps 7–11 are administrative reviews; steps 12–15 require more technical familiarity.

Whenever possible, use change bars to identify any changed sections.

Step	Description	Actions	√
7	<b>Front matter</b>	<ul style="list-style-type: none"> <li>• Verify company names, addresses, phone numbers, URLs, and e-mail addresses.</li> <li>• Verify disclaimer and warranty statements.</li> <li>• Verify current trademark/registered trademark information via manufacturers' Web sites.</li> <li>• Verify that the release date is in this format: <b>Documentation release: &lt;version&gt; &lt;mo. yr.&gt;</b></li> </ul>	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
8	<b>Table of contents and chapters</b>	<ul style="list-style-type: none"> <li>• Check that page numbers point to the correct sections (sample a variety of sections).</li> <li>• Look for obvious TOC omissions or anomalies.</li> <li>• Verify that chapters appear in the correct order.</li> </ul>	<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
9	<b>Headers</b>	<ul style="list-style-type: none"> <li>• Check that the document release month and year appear in the header of all chapters.</li> <li>• Verify that chapter and/or section names appear in alternating page headers and/or footers.</li> </ul>	<input type="checkbox"/>
			<input type="checkbox"/>
10	<b>Footers</b>	<ul style="list-style-type: none"> <li>• Check the page number continuity throughout.</li> </ul>	<input type="checkbox"/>
11	<b>Cross references</b>	<ul style="list-style-type: none"> <li>• Verify that cross references point to correct page numbers and headings (sample all chapters).</li> </ul>	<input type="checkbox"/>
12	<b>Index</b>	<ul style="list-style-type: none"> <li>• Check that the index page numbers point to the correct sections (sample a variety of entries).</li> <li>• Test usability by attempting to look up a broad variety of key words and ideas.</li> </ul>	<input type="checkbox"/>
			<input type="checkbox"/>
13	<b>System requirements</b>	<ul style="list-style-type: none"> <li>• In installation or applicable sections, verify that system requirements are correct and reasonable.</li> </ul>	<input type="checkbox"/>
14	<b>Troubleshooting</b>	<ul style="list-style-type: none"> <li>• Verify that fixed problems or updated solutions have been included in the troubleshooting tips.</li> <li>• Verify the accuracy of troubleshooting solutions.</li> </ul>	<input type="checkbox"/>
			<input type="checkbox"/>
15	<b>Overall content and changes</b>	<ul style="list-style-type: none"> <li>• Check that the flow of information is logical.</li> <li>• Review any new text or changes to previously incorporated text for mistakes or inaccuracies.</li> </ul>	<input type="checkbox"/>
			<input type="checkbox"/>