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Technical Content Review

Overview

This Technical Content Review examines written communications produced as part of the project to inform/educate/persuade both internal and external audiences of technical architects and software engineers (e.g. Architectural overviews, SDKs, Programming Guides, Technical Contract Models [frameworks, data schemas, network messages], Pre-sales Technical Presentations, Technical Training Courses, Technical Whitepapers).

The goals of the Technical Content Review is to assist reviewers in ensuring each technical document is accurate, well presented, informative and suitable to its purpose.

References

An interesting book discussing technical content issues is:

“Agile Documentation”, Andreas Rüping, ISBN: 0-470-85617-3, Wiley, 2003.

Checklist - General

- Purpose of document: Has the purpose of the document been clearly articulated? (to inform, to persuade, to evaluate alternatives, to sell, ...)
- Focus: Does the document focus appropriately on delivering on the stated purpose and not meander off it all directions covering unrelated topics?
- Target audience: Has the target audience been identified?
- Level of document: Is the technical level of the document pitched correctly for the target audience (i.e. neither too elementary nor too advanced)?
- Terminology: Are most of the terms used within the general understanding of the target audience and are there clear explanations of novel/project-specific terms?
- Quality of writing: is the text well written?

- Quality of editing: has sufficient editing being applied to the text? Are there any areas that should be tightened up editorially?

Checklist – Documentation Set

- If this document is part of a larger documentation set, are the topics that need to be covered distributed appropriately among all the documents?
- Is no content duplicated in multiple documents?
- Does the documentation set as a whole work well?
- Is the order in which documents in the document set should be read identified in one document, and that document somehow identified as the one to start with?
- Is it easy to find topics within the document set? Is there a documentation set-wide table of contents and index?

Checklist - Content

- Technical Accuracy: Are the descriptions the content provides technically correct and unambiguous?
- Is the content in sync with regards to other content targeting the same audience - e.g. for marketing docs, should not have different material from the organization towards a customer with conflicting statements or recommendations – all docs need to be “on message” (delivering the same message)
- Writing style: Is the author's use of language appropriate for the target audience?
- Grammar: Is the text grammatically correct?
- What are the positive and negative aspects of the content?
- Are there new areas that should be covered or existing areas that could be removed?
- Should the scope of what is covered in the content be expanded or contracted?
- Is the general organization of the content in the document satisfactory?

Checklist - Flow

- Logical flow – is the flow of the content logically organized -with an introduction, general coverage, more specialist coverage and conclusions?
- Order of topics: Are the topics covered in a sensible order – with no or few forward references

(i.e. expecting the reader to understand a topic earlier in the flow from where it has been introduced)?

- Does the introductory chapter provide a roadmap to the rest of the document?
- Where appropriate, does the concluding chapter summarize and draw conclusions from what has been discussed in the document?
- Are custom reading paths supported? Rather than expecting readers to read a document linearly from front to back, can they pick and choose among the different sections that interest them?

Checklist - Layout

- Use of graphics: Are there sufficient graphics – both in quantity and in number, provided to illustrate points as needed? Are the graphics and tables in close proximity to the text that discusses them?
- Is enough whitespace used to surround the text and graphics?
- Is there a small number of typefaces / sizes / variations in use?

Checklist – Production Values

- If the document is to be provided to readers in paper format, will the content display well on each of the targeted formats (U.S. Letter, A4, other)?
- If the document is to be provided to readers in electronic format, will the content display well in each of the targeted formats (e.g. W3C XHTML, Adobe PDF, Microsoft HTMLHelp [* .chm], other)?
- Do the general production values of the document reflect well on the quality standards of this organization (becomes more important the wider the distribution of the document)?
- Are all tables and figures (diagrams, screendumps, photos) numbered and labeled with appropriate captions?

Checklist – Frontmatter and Backmatter

- Is the title page of the document completed correctly? For documents aimed at an external audience, are the visuals on the title page of a professional standard?
- Where appropriate, is adequate versioning / revision history data provided?
- For longer documents, does the front matter include a table of contents, a table of tables and a table of figures?

- For longer documents, does the backmatter include an index, a glossary and a complete list of references? It is preferably that references be accessible – online or readily available books – not proceedings of some distant conference that are not online and not available in print).

Checklist – Intellectual Rights & Obligations

- Is the owner of the copyright of the document explicitly identified – this should include use of the symbol © or the word “Copyright”, followed by the full organizational name (no abbreviations) and the year or years in which the document was written (and from when the copyright term begins)
- Is the copyright statement followed by a clear rights statement informing the readers what they may do with the document? This could be “All rights reserved”, or if using licensing such as Creative Commons, “Some Rights Reserved”, or if in the public domain, “No rights reserved”.
- Trademarks: Are all trademarks presented appropriately, in capitalized form, with their first use followed by TM (for trademarks) or ® for registered trademarks.
- Where the document format permits, is there a list of this organization's trademarks in the frontmatter?
- Where this document uses extracts from other documents which are not owned by this document's copyright holder, does this use fall within fair use (short quotations, with reference to original document), or has the original document copyright holder provided explicit written permission for the use of longer extracts?
- Trade secrets – are any trade secrets inappropriately revealed in this document?
- Distribution – Is the permissible distribution of the document clearly labeled - e.g. project management only, project team only, division-wide, organization-wide, external partners under NDA (non-disclosure agreements), or the general public.

Checklist - Conclusions

- Does this document reflect the expected quality standards of this organization?
- Would you have been proud to have authored this document yourself?
- Are there any other more suitable approaches to documenting this topic?
- Suggestions: Have you any suggestions for improving this document?