

Documentation Projects: How To Do a First Draft Review

By Tanja Rosteck

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When time is short and your to-do list is long, dedicating time to reviewing an outsourced draft document can seem like an impossible task. You might think, "Why bother? It's only a first draft anyway, and the writer will surely catch the typos."

But a first draft review involves much more than checking for typos. Documentation development is a collaborative effort, and a writer cannot produce a correct and effective document without input from those who know the product best and are responsible for its success. Yes, that's you!

Here are some tips for doing a complete and efficient first draft review. Keep a text file open at all times during the review to record all your notes and thoughts - you can always edit before sending it to the writer.

* Re-affirm the goal of the document.

Before you start reading the draft, review the goals of the document so they are clear in your mind. Is it an online help file for end-users, providing usage basics only? Or is it an installation guide for a network software product, targeted towards experienced system administrators?

* Does the document meet the primary goal?

First, skim the entire draft in one sitting (if possible) and focus only on the big picture. Is the document meeting its primary goal?

For example, does the installation guide clearly explain how to install and configure the product, including any additional network

configurations required? Does the end-user help file clearly explain what the program does and how to perform basic tasks, but not overwhelm with highly-technical information?

* Is the information technically accurate?

This is where the writer needs your input the most. Ideally, the person who knows the technical side of the product best should be the one doing this part of the review.

Check to see that all commands and menu items are referenced (and spelled) correctly, the order of installation / configuration steps is accurate, and - most importantly - if any relevant technical information is missing.

* Is the material organized effectively?

Pretend you are an end-user of your product, and start 'using' the document to see how logically the information is structured. Is it easy to find what you're looking for via the navigation system (bookmarks, table of contents, et cetera)? Do you think the installation steps are clearly presented and easy to follow?

* Are screen shots up-to-date and correct?

If the document contains graphics and/or screen shots, ensure they are recent and appropriate. This is often overlooked in software documentation, when sometimes the document is being written while the product screens are still under development.

Make sure you and the writer are clear on which graphics need to be replaced, and when you'll be able to provide the latest version of the software so the writer can take new screen shots.

Waiting until the second or third draft to start addressing these issues can add significant time to the documentation development process (and therefore the cost). It's much easier for everyone to focus on *preventing* problems at this stage, rather than letting them go and fixing them later.

And remember, the first draft is not a finished product - it's only the first step. Point your documentation project in the right direction by making that first step count!

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providing software companies with professional and affordable online help, user manuals, installation guides, and web content/design. Visit Words4Nerds at <http://www.words4nerds.com> - check out our free monthly e-zine, full of tips for improving the quality of your writing and product documentation.

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