

Editing Matrix for Hard-Copy Documents

Project name: _____

Your phone number: _____

Your name: _____

MS Word or FrameMaker: _____

Lead Writer: _____

Document number: _____

Document title: _____

Number of pages: _____

Has document been through previous edit?: _____

Date turned in for this edit: _____

Who and when?: _____

Date and time edit due: _____

Editor for this review: _____

Date and time edit complete: _____

Editor's Overview

(editor fills in after completing edit)

Question	Major Problems	Needs Some Work	Well Done	Additional Comments
1. Is the language concise, simple, and clear, and is the level of detail appropriate for the document type and audience?				
2. Does the writer follow standard rules of spelling, punctuation, and grammar?				
3. Is the structure of the document logical and predictable?				
4. Are all the components of the document formatted per standards and project standards?				
5. Are the pagination and autonumbering correct throughout the guide?				
6. Is the document complete? Are there any obvious omissions or superfluous information in the document?				

Is another editorial review recommended?

yes _____

no _____

Is a learning meeting recommended?

yes _____

no _____

Clarity of Presentation

Activity	Writer Comments	Major Problems (<49%)	Needs Some Work (50-89%)	Well Done (90%>)
7. Have you used short sentences and paragraphs?				
8. Is the format easy to read and reference?				
9. Are same-level headings parallel? Are headings concise, informative, and descriptive?				
10. Are headings balanced? In other words, there should be no single subheadings within a chapter or section.				
11. Do the headings represent a logical presentation of information?				
12. Is information grouped into small, manageable units for emphasis and subordination?				
13. Are dangers, cautions, and notes formatted correctly and used appropriately?				
14. Are procedure steps numbered sequentially?				
15. Are procedure steps specific and task-oriented? Does each step address only a single action?				
16. Are procedures formatted consistently? That is, verb first or prompt first—for example <i>Type login ID at the \$ prompt.</i> or <i>At the \$ prompt, type login ID.</i>				
17. Does text accurately and effectively explain corresponding graphics?				
18. Are repeated words, phrases, and abbreviations used in a consistent, parallel manner?				
19. Have you established the document's conventions in the preface? Are these conventions applied consistently and logically throughout the document?				

Style Conventions

Activity	Writer Comments	Major Problems (<49%)	Needs Some Work (50-89%)	Well Done (90%>)
20. Did you use the most recent version of a PLM template or product document template?				
21. Are the dates on the Version Notice page, the Title Page, and all of the footers the same?				
22. Is the document number format correct on the Title Page?				
23. If applicable, does the document include the correct fair compensation statement?				
24. Do the release and draft number on the Version Notice page match the draft and release level indicated by the document number on the Title Page?				
25. Does the Version Notice include the correct trademark statement?				
26. Does the Version Notice include the correct copyright notice?				
27. Are odd and even headers and footers formatted correctly, and do they appear on the appropriate pages?				
28. Is the first page of each chapter formatted correctly—that is, no header, pagination starts at x-1, and so on?				
29. Does each footer contain the correct confidentiality statement?				
30. Do all blank pages have headers and footers?				
31. Do all chapters begin on a right-hand, odd-numbered page?				
32. Does the trademark list on the Version Notice page reflect all trademarked product names used in the document, and accurately note whether the trademark is registered or not?				
33. Have you avoided widowed text and widowed introductory paragraphs?				
34. Are all figure and table captions, callouts, headers, and footers consistently styled?				

Style Conventions (Continued)

Activity	Writer Comments	Major Problems (<49%)	Needs Some Work (50-89%)	Well Done (90%>)
35. Have you used active voice and present tense whenever possible?				
36. Have you avoided abbreviated Latinisms, such as etc., i.e., and e.g.?				
37. Have you avoided the use of parentheses, except when defining acronyms?				
38. Have you avoided all contractions?				
39. Have you used gender-neutral writing?				
40. Is there an introductory paragraph for each list, subheading, and procedure? Are these paragraphs worded consistently?				
41. Have you avoided empty headings—that is, two headings with no text between them?				
42. Is each list styled correctly for line spacing, capitalization, and punctuation?				
43. Are list items written using parallel construction?				
44. Have you used the correct text symbol to set off each list item?				

Cross-Referencing and Term Definitions

Activity	Writer Comments	Major Problems (<49%)	Needs Some Work (50-89%)	Well Done (90%>)
45. Is the TOC accurate?				
46. Are the List of Figures and List of Tables accurate?				
47. Is the Glossary comprehensive and accurate?				
48. Is the Index styled consistently? Is it comprehensive and accurate?				

Cross-Referencing and Term Definitions (Continued)

Activity	Writer Comments	Major Problems (<49%)	Needs Some Work (50-89%)	Well Done (90%>)
49. Are references to figures, tables, and other sections of the document accurate and consistently worded?				
50. Do cross-references give a reason for the reference?				

Grammar, Spelling, and Punctuation

Activity	Writer Comments	Major Problems (<49%)	Needs Some Work (50-89%)	Well Done (90%>)
51. Do nouns and verbs in the same sentence agree in number?				
52. Do verbs in the same sentence agree in tense?				
53. Have you avoided dangling phrases and expressions?				
54. Are sentences punctuated correctly?				
55. Is capitalization consistent?				
56. Are compound words, such as on-line and online, treated consistently?				
57. Is the form of numbers used consistently—that is, are numbers less than 10 written as a symbol or as a word?				

Administrative Issues

For document retention purposes, is the document archived on the xxx server in the /xxx/xxx location? yes ____ no ____

Is the working copy of the document backed up on a server? yes ____ no ____

Writer's Comments: _____

