<http://jira.pentaho.com/browse/DOC-3129>

Combined with: <http://jira.pentaho.com/browse/DOC-3128>

<https://pentaho.box.com/s/wv5fcqsf6bvysroob1hr6l8uk2yplj07>

Create process documentation for peer review checklist

SME – Greg

Putting the content found in <https://pentaho.box.com/s/txd7z6bfqrov6gdmop2r7q710w73rgrs> in the iWiki.

A link to the actual checklist on Box (<https://pentaho.box.com/s/txd7z6bfqrov6gdmop2r7q710w73rgrs>).

Revise the checklist as needed.

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<http://iwiki.pentaho.com/display/DOC/Documentation+Home>

<http://iwiki.pentaho.com/display/DOC/Peer+Reviews>

# Peer Review Process

Peer reviews add quality to our documentation, allowing for a single Pentaho tone and voice, consistency, and accuracy across the documentation set. This article outlines the revision and peer review process for both new and existing content.

It is essential for the Documentation team to capture the process we use to write and develop our content for MindTouch articles. The team performs peer reviews on all new and edited MindTouch content.

New content and extensive revisions to existing content are done in Microsoft Word. We use Word for peer reviews of content because of Word’s ability to track changes and capture comments. This collaborative process ensures that all technical writing meets departmental and Pentaho publishing standards.

In summary, peer reviews provide the following benefits:

* Consistency across the Pentaho Documentation set
* An audit trail of all changes
* Ability to roll back changes to a previous version
* Cross-training for writers to learn documentation standards and gain Pentaho product knowledge.

The peer review process has three main steps:

1. Create or revise existing MindTouch content in a Word document.
2. Complete all peer review tasks associated with the Peer Review Checklist.
3. Meet with the reviewer to discuss major content changes and resolve questions or issues.

Note: Some peer reviews, because of the minimal changes involved (minor punctuation, spelling, or grammar issues), will take place in the MindTouch article. This decision is at the writer’s discretion.

Some items on the Peer Review checklist only pertain to a MindTouch content review.

## Peer Review Process as a Writer

Stem sentence – some variation on this part of the peer review role – assumptions, etc. depending on situation, benefit, etc-

1. Create the new or revised content in a Word document. Turn on Track Changes.
2. The Box folder and the Word doc are named for the corresponding JIRA story (e.g., **DOC-3129**)
3. Place a copy of the Peer Review Checklist in the same Box folder with the Word document.
4. Request a peer review meeting via Outlook.

## Peer Review Process as a Reviewer

If you are responsible for doing a peer review, your review will be guided by the Peer Review Checklist. See the Checklist section for details.

Your part of the process is to review the content and provide feedback to the writer. Revise the content to conform to the Pentaho voice, tone and standards of Pentaho documentation and avoid editing or revising the document to your own preferences or writing style.

The technical writer will send you a link to the Word document or the MindTouch article.

1. Open the Word document in Box, and ensure Track Changes is enabled.
2. Make your suggested edits within the document. Provide additional feedback using the Comments feature on the Review ribbon.
3. Save the revised or commented Word doc in the assigned file location on Box. You don’t need to change the name of the Word file or create a new Word file, because revisions to the review file are automatically tracked in Box.
4. Complete the Peer Review Checklist and save the revised version of the Checklist on Box.
5. Let the writer know you’ve reviewed the document. The writer will arrange the peer review meeting.

## Peer Review Meeting

Once the review is complete, the writer and the reviewer can meet to discuss the peer review, go through any questions about the content or the Peer Review Checklist, and supply direct feedback.

## Checklist (3129)

NOTE - Copy of checklist goes here. Link to URL for checklist in Box.

[https://pentaho.box.com/s/t xd7z6bfqrov6gdmop2r7q710w73rgrs](https://pentaho.box.com/s/t%20%20%20%20%20%20%20%20xd7z6bfqrov6gdmop2r7q710w73rgrs)

DC – Template of the checklist

## Checklist – Top Section

**–**

**(Y/N) –**

**(Y/N) –**

**Reviewer –** The name of the technical writer who conducted the peer review.

**New or Revised Content –** Is this new content or are these revisions to an existing MindTouch article?

**Word Document Location on Box –** The complete URL of the location where the Word document for this review is stored.

**MindTouch article(s) URL –** The complete URL of the MindTouch article being reviewed.

## Checklist – Pre-Review Section

**Is the content in the correct MindTouch article(s)? –** Verify that the content is being prepared for the appropriate article or section in MindTouch. Look at the article in the context of its section and the related articles, as well as the neighboring articles.

**Were all relevant articles updated? –** Verify whether there are relevant articles in MindTouch that also need to be updated, based on this new or revised content. Verify whether any affected articles or sections in MindTouch require updates or possibly revision cases in JIRA.

**Are all specified versions updated? –** Verify that all affected Pentaho versions of the product documentation have been updated.

**Can the user navigate to and from the article? –** Verify that the reader can navigate to and from the revised MindTouch article. The reader should not come to a “dead-end” or be led away (or astray) from the revised article without a clear navigation path back to it.

**Is the product naming consistent? –** Verify that any new or revised naming conventions are consistent with the Pentaho Style Guide. Verify whether any revised naming convention affects other MindTouch articles. Use the search function to find terminology occurrences across the version of the documentation that is being updated or that may need to be updated.

**Are any of the links broken? –** Verify that all URLs contained in the article are correctly linked and working.

**Any external links not available yet? –** Verify any links in the revised article to ensure they are still currently available. If they are not available, verify when they will be available and who is responsible. Is this a Release Readiness story? Verify whether there are associated tasks, cases, or bugs that might affect the links contained within this MindTouch article or articles related to it.

## Checklist – Structure Section

**Does the topic have a logical flow? –** Verify that the article and its topic move the reader along a consistent and logical path to the successful completion of one main task.

**Is the content comprehensive enough to complete the requirement of the case? –** Verify whether the topic is unique and warrants its own MindTouch article. Look at possible ways this new or revised content might be combined with existing content or articles. Is it possible to reduce the number of MindTouch articles necessary for the reader to find the information or complete the specific task?

**Is it concise? –** Keep the article concise by focusing the reader on the successful completion of the task. Remove any unnecessary information that doesn’t advance the reader quickly through the task steps. Eliminate or reduce content that is primarily reference material.

# Checklist – Content Section

**Does this content address the appropriate audience? –** Verify the intended audience and target the article to their expertise technical level. There is no need to over explain or provide reference and background material to an audience who already knows it and is primarily seeking to accomplish a specific task.

**Is the tone too conversational or too formal? –** Avoid stilted and formal language; however, do not get too breezy, informal or persuasive. Strike a tone of professional helpfulness, without any excessive verbiage that detracts the user from accomplishing the article’s specified task.

**Is the terminology consistent with our style guide? –** Check all terms and product-specific nomenclature with the Pentaho Style Guide.

**Does it have a unified tone? –** The article probably has an extensive version history, edited by several individuals over several releases and years. Review the article for a unified, consistent Pentaho tone and voice..

**Is it written in active voice? –** Review verb usage for weak or passive structures that are excessively wordy and verbose.

**Are action verbs used? –** and help to keep it

**Does each sentence focus on a single point? –** Review each sentence for the “rule of one” to ensure that each sentence has one main point. Likewise, verify that each paragraph has a single main point and each article has a single task or purpose.

**Is marketing language used? –** Marketing language in a technical document is distracting. It reduces focus on the steps necessary to complete that task. Technical writing does not attempt to sell the user on the product, its features or benefits. Marketing language is recognizable by its more informal, but persuasive tone.

**Are you confused by any of the content? –** If you find the material confusing and difficult to understand, chances are the user may too. The task and its steps should progress the reader along a clear line of intentional action. Flag any sections where you, as a reader, feel lost, uncertain, or unsure of what is being said or directed for you to do. This is a sign that the material might need clarification and revision. As a reviewer, don’t be afraid to challenge a statement or ask for clarification to expand your technical knowledge of the product.

## Checklist – Format Section

**Any grammatical errors? –** Review the article for grammatical errors. Look up questions that arise and verify correct usage.

**Any punctuation errors? –** Review the article for punctuation errors. Look up questions that arise and verify correct usage.

**Any typos or spelling errors? –** Review the document for typos, spelling mistakes, and words that might be spelled correctly, but are incorrectly used. Skimming the document backwards can help you spot these types of mistakes. Look up questions that arise and verify correct usage.

**Are the appropriate styles used? –** Verify that all fonts, headings, and styles in the MindTouch article are used correctly, per the Pentaho Style Guide.

**Are numbered or bulleted lists properly formatted? –** Review lists for missing numbers, typographical errors, or formatting errors (such as misaligned margins).

**Are the lists under 10 items? –** For clarity and simplicity, reduce numbered lists to no more than 10 items or tasks. This helps keep the reader focused and gives the reader a sense of quicker completion. If a list is longer than 10 items or requires more than 10 items, review the possibility that the list may need to be broken into sections or possibly a separate article.

**Are any contractions used? –** Avoid use of contractions. Contractions lend an informal tone to the article.

## Checklist – Graphics Section

**Do the graphics add value to the content? –** Avoid excess graphics. Verify that the graphics used clarify and help the reader complete the task. Ensure that the graphics have reduced the need for excess narrative.

**Are the graphics up to date? –** Outdated graphics probably contain irrelevant or incorrect information. Update graphics or look for ways to remove graphics that may no longer be necessary.

**Are colors correct per our standards? –** Verify the correct or current colors for screen shots and callouts, per the Pentaho Style Guide.

**Are the annotations correct? –** Verify that annotations to graphics are grammatically correct and concise. Review annotations for typos, misleading, excess, or outdated technical information.

**Are the graphics set as Responsive? –** If this review is limited to a MindTouch article, verify that any graphics are saved as “responsive” (i.e., when viewed on mobile devices, the pages and graphics adjust automatically to the device).

# Reference:

