Prepare the draft

Define the purpose, sources and owner

Start with the reader

This guide uses a help-center article as its example. Record the task readers want to complete, what they already know and the action they should take after reading. Keep each article focused on one main question.

Gather the sources

Collect product notes, screenshots and confirmed support questions. Keep a source and review date for each item. Mark unverified information as an open question instead of presenting it as a fact.

Prepare the handoff

Organize headings in task order. State the outcome before the steps and examples. Give the reviewer both the editable draft and an open-question list so they can identify decisions that need an owner.

Preparation item	Required handoff
Purpose	Reader task and context
Sources	Link, owner and review date
Outline	Headings, steps and a complete example
Open questions	Question, decision owner and due date

Review and revise

Check the content before the layout

Follow the reader’s path

Complete the documented task from start to finish and check for missing steps. Verify numbers, terminology, links and captions against the sources. Resolve factual disagreements before polishing the wording.

Keep one working draft

Apply changes to one editable source instead of maintaining competing final versions. Separate factual errors, comprehension problems and style preferences. Resolve the first two categories first and record why any material feedback was declined.

Export and inspect again

Generate a new PDF after revisions. Check table continuation, heading placement, image positions and page numbers. A preview from an earlier draft cannot establish the quality of the revised export.

Review item	Acceptance condition
Facts and numbers	Traceable to confirmed sources
Instructions	Steps produce the expected result
Tables and images	Complete, legible and unobstructed
Sign-off	Owner confirms version and open issues

Publish and archive

Deliver one version and keep the editable source

Confirm the release

Check the title, version number and approving owner. The PDF and source document must carry the same version. Point download links to the files that passed review, and remove references to superseded attachments.

Create an archive record

Keep the editable source, PDF and change log in one project folder. Include the topic and version in filenames. Record the changes, release date and responsible owner so another editor can maintain the article later.

Schedule the next review

Collect questions from readers after release. Update instructions when the product changes. Review broken links and outdated screenshots periodically, then inspect the exported files again after every material update.

Archive item	Example file or owner
Editable source	help-export-v1.0.docx
Reading copy	help-export-v1.0.pdf
Change history	CHANGELOG.md
Maintenance	Content owner · quarterly review