

EDITING

Editors

“The art and skill of editing require knowledge of both the use of language and the methods by which we make sense of information.”
Rude, *Technical Editing*

Editor's Role

- Prepares documents for publication in print and online, advocating for audience and purpose
- Editors work with a document's:
 - * content (completeness and accuracy)
 - * organization (structure and logic)
 - * style
 - * design
 - * usability

Editor's Skills

- Visually and verbally sophisticated
- Detail oriented and broad thinking
- Tactful
- **Reader experts** who envision the audience and understand who they are, what they need from the document, and how they will use it
- **Communication experts** who know:
 - * how readers use documents and how to use that knowledge to shape a document's content, organization, and arguments
 - * rhetoric and how to make a message compelling
 - * options for visual design and media, and can advise writers about the best choices for usability
- **Language experts** who know the rules of grammar, usage, and style, and where to find help when unsure
- **Project managers**, coordinating the efforts of team members and ensuring the information produced collaboratively is complete, consistent, and appropriate for the purpose

Communicating with the Writer

1. Agree with writer on level of edit.
2. Establish specific editing objectives.
3. Establish plans to work toward consensus.
4. Clarify document context (situation).
5. Discuss how document will be delivered.
6. Determine the style guide.
7. Agree on deadlines and contact
8. Check and save the doc upon arrival.
9. Confirm receipt.

Readers

Reading Truths

1. Communication is an exchange of meaning and readers create their own meaning. Writers aim to reduce variations with:
 - * dominant definitions
 - * familiar design
 - * hierarchies of information
 - * connections between known and new
2. Readers do not read technical materials in a linear fashion and they only read what they need. Writers orient readers with navigational cues:
 - * TOC, indexes, running headers
 - * icons and designs
 - * page design and information order

Attributes of an Editorial Situation

- **Origins and Impact**—The reason for which the document was created and what happens or changes as a result of the document
- **Readers and Use of Document**—What readers already know and how they will use the document
- **Culture and Expectation**—The beliefs, customs, and ways of thinking that shape a reader's perspective and how they shape what readers will expect for a document
- **Constraints** on development and production and **considerations of accessibility**

Reading Signals

- **Verbal**—words and sentences that cue the reader; e.g., *Warning!* or *First, you must ...*
- **Structural**—how content is organized to direct the reader; i.e. words > sentences > paragraphs > sections > documents
- **Visual**—information design; e.g., headings, white space, icons

Letter of Transmittal Sandwich

Identify document. Give goodwill compliment.

Remind writer of level of editing; outline work done; identify reference style guide used, etc.

List improvements and suggestions, in order of priority. Suggest minor changes on doc itself.

Suggest next steps. Offer additional help (or not).

Finish with goodwill closing.

Levels of Editing

Comprehensive Editing

Editing for organization and style. Evaluates how well concept, content, organization, visual design, and style support comprehension and probable uses of the document.

Checklist

- Right information and right amount
- Organized content, easy to navigate
- Attractive visual design, easy to read/use
- Style matches the situation and audience
- Quality illustrations in the right places
- Accessibility issues considered
- Suitable for other documents and media

Avoid copy editing before comprehensive editing. Instead, make the headings consistent—a bottom-up task that supports top-down editing.

Copy Editing

Editing for clarity and style. Cleans up the text, and ensures document accuracy and completeness.

Checklist

- **Verbal**—semantics, syntax, and style
- **Visual design**—typography, layout, colour
- **Tables and figures**—titles, callouts, captions, and consistent quality and style
- **Mechanical**
 - * spelling, punctuation, abbreviations
 - * capitalization, hyphenation, numbers
 - * cross-references and references
 - * lists and formatting styles
 - * type style (bold, italics)
 - * word use
- **Content**—accuracy, consistency
- **Document**—structure, organization

Proofreading

Editing for quality control. Final check to ensure corrections and instructions have been followed.

Checklist

- Content check
- Style and usage; plain language
- Uniform vocabulary
- Eliminate stereotyping
- Names and titles; geographical names; addresses
- Spelling, punctuation, grammar, etc
- Reference notes
- Format
- Research as needed

Honour editing limits set by role, time, importance. Edit to level requested unless a situation of potential danger or violation of law or ethics.

Edit for Style

Situation

Consider the readers and a document's purpose.

Sentence Structure

Structure sentences to enhance comprehension.

- Use sentence structure to reinforce the importance and relationship of ideas.
 - * main idea of the sentence in the structural core
 - * subordinate structures for subordinate ideas
 - * parallel structure for parallel items
- Arrange sentences for clarity and cohesion.
 - * subject and verb near the beginning of the sentence
 - * arrange for end focus and cohesion

Cohesion—Subject presents familiar information, followed by predicate, which presents new information. The new information then becomes the subject of the next sentence.

End focus—Place important information in the predicate (end) to take advantage of readers' expectations that the predicate will add information.

- * subject-verb-object/clause order
- Adjust sentence length for clarity and engagement. Generally, keep sentences short for clarity but vary sentence length to keep readers engaged and to enhance interpretation.

Word Choice

- Use verbs that convey action accurately and forcefully.
- Choose nouns that are concrete and understandable.
- Only use adjectives when necessary; when used, choose precise, clear words.
- Use people as agents whenever possible.
- Use positive constructions.

Word Spelling and Usage

- **centre** - Br. noun; **center** - Am.; Br. verb
- **copy edit** (AP Style) not copyedit
- **defence** - Br.; **defense** - Am.
- **lay** - to put, place, or prepare; trans. verb; takes an object; **lie** - to recline or be situated; intrans. verb; no object
- **lend** - v.; **loan** - n. and Am. verb but only with physical transactions
- **licence** - Br.; **license** - Am.
- **then** or **and then** - don't use

	Delete		Flush Left		Set in Bold Face Italic
	Insert		Flush Right		Set in Light Face
	Join		Center Horizontally		Wrong Font
	Move closer		Center Vertically		Hyphen
	Space		Move to the next line		En Dash
	Add Space		Move to the preceding line		Em Dash
	Delete Space		Indent 1 em		Superscript
	Transpose Word		Indent 2 ems		Subscript
	Transpose Letters		Paragraph		Comma
	To separate two or more marks		All Caps		Apostrophe
	Let it Stand (ignore correction)		Small Caps		Period
	Move Left		Caps & Small Caps		Semicolon
	Move Right		Capital Letter		Colon
	Move Up		Lower Case		Quotation Marks
	Move Down		Set in Roman		Parentheses
	Align Vertically		Set in Italic		Brackets
	Align Horizontally		Set in Bold Face		

"If you can't state a specific reason [for a change], such as a grammatical rule or an organizational concept, refrain from making a change, because it's likely that you are just changing the document to be written in your personal style."
Rude, *Technical Editing*

Abbreviations

- **Plurals**—Add an *s* without apostrophe to form plural of most abbreviations. Use an apostrophe with an *s* when:
 - * resulting form would be ambiguous (c.o.d.'s)
 - * abbreviation has more than one period (G.M.'s)
- **Spaces**—Do not use spaces between letters, or between letters and periods (AT&T not A T & T; Ph.D. not Ph. D), but separate initials in names (T. S. Eliot).

Colons

Use only to connect complete sentences to complete sentences or connect complete sentences to lists.

Commas

Use a comma:

- after all introductory elements
- before conjunctions in compound sentences
- before the "and" in a series of three or more (serial comma)

Hyphens and Dashes

- No spaces before or after
- Words enclosed by a pair of dashes often provide an explanation or give parenthetical information. Dashes emphasize; parentheses de-emphasize.

- Hyphenate a unit modifier ("5-year") made up of a number followed by a unit of measurement.
- If the initial adjective or noun modifies the final (and real) noun, do not use a hyphen. If the initial adjective or noun modifies the noun directly following it, consider using a hyphen (embryonic stem cells).

Numbers

- Write out zero through nine and first through ninth.
- Write measured or calculated quantities as numerals and abbreviate the units (10 L, 1.75 in., 6 kg, 2.4 ms).

Semicolons

Use to connect two (or more) sentences that seem very closely related and to clarify the punctuation of a series of items that have their own internal commas.

Units of Measurement

- When a symbol consists entirely of letters, leave a full space between the quantity and symbol (45 kg).
- Do not use a space when symbol includes a non-letter character as well as a letter (32°C).
- Insert a hyphen between a number and symbol used adjectivally (35-mm film).
- Symbol L (litre) is capitalized (to distinguish it from 1).
- Abbreviations for English units of measurement use periods, but abbreviations for metric units of measurement do not (doz. oz. ft. but g m cm).