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Ten Steps To An Edited Ms: The Practice Of Editing

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I have worked for almost thirty years as a freelance editor, and in that time I have developed a systematic, streamlined process which I apply to each job. I feel a bit exposed, discussing it here, because I realise I've never talked to anyone about it before. My family don't know what I do when I disappear into my workroom; my colleagues know what I do, they see the results, but they don't care how I do it. Nor have I ever seen this mentioned in editing textbooks—they tell you what to do, but not how.

As any editor knows, every book is different. Therefore it's more efficient to emphasise their similarities, to fit them all into the same framework, to minimise the variables, so you can concentrate on the differences that are significant. This can free you, in the same way that routine can free you to concentrate on the important things—but, like routine, it should not become an end in itself.

I'll mention editing on screen, but I've only been working on screen for a few years, and I'm still refining my processes. I'd welcome any advice and contributions on what you've found to work for on-screen projects.

What I'm presenting here today is not a franchise; it doesn't have to be adopted in every detail. I don't apply it rigidly myself. I don't hesitate to add more steps when I need them for a particular job. I don't often skip steps, though. I generally fit any job I do, from a ten-page magazine article to a 1000-page economics textbook, into this framework of ten steps. But I'm not laying down the law here, I'm trying to promote discussion. I offer my system simply as a workable model, and I hope to provoke you into thinking about your own working methods and how you can make them more streamlined and efficient.

Keeping track

I try to keep paperwork to a minimum, but I keep three kinds of records: a schedule, a diary, and a workplan. At one time I decided to get big and employ several sub-contractors, so I had to develop good systems for keeping track of schedules and work in and out. After a while I gave up employing others, because I really prefer editing to managing, but I have been in charge of as many as eighteen jobs at a time.

The schedule

The schedule is the bane of every freelancer's life. One phonecall to tell you that something is coming—or, more often, isn't coming—can change your whole week, your whole month. I keep my schedule in pencil in the front of my financial year diary. The column 'others' allows you to track work given to sub-contractors. When I receive a schedule for a job, I fill in all the deadlines right through to the proofs. If something doesn't turn up on time, I phone the client or the author and find out what's happening.

Aug

Due in

Working on

Others

Due out

1

EDWARDS 2nd prfs

MACGREGOR edit MS

2

MACGREGOR edit MS

3

VINCENZO idx

MACGREGOR edit MS

MACGREGOR acxn

4

VINCENZO idx

VINCENZO idx

5

EDWARDS 2nd prfs, idx

EDWARDS 2nd prfs

6

7

8

CHAN acxns

CHAN finalise MS

9

10

ABERFOYLE MS

11

ABERFOYLE edit MS

CHAN ed MS

12

ABERFOYLE edit MS

13

14

15

HEINZ MS

ABERFOYLE edit MS

16

17

18

19

20

The diary

In my diary I record work done on each job, identified by the author's name. In educational publishing it's usual to identify jobs by title, but in my experience the title sometimes changes during production, whereas the author's name doesn't. It's useful to write the author's name prominently in your diary at the beginning of each entry so you can look back and find previous entries relating to that job.

I also keep a running total of hours worked on each job, as a circled figure. When I invoice, I mark the total specially, to prevent double billing. This is important when you work on a job in stages and send progressive invoices.

1 August

EDWARDS: ph. LK re non-arrival 2nd prfs. Now due tomorrow.

CHAN: author ph. with queries.

MACGREGOR: 2nd go headings, prelims, pix, 6 hrs. 31

The workplan

The workplan I maintain on screen. I adapted it from a board that I saw in the office of an engineer, and over time I've added a couple of extra columns as I found I needed them. I update it about once a week, more often if I'm busy.

Last updated: 1 August

Publisher

Author & Title

Stage

Last Action

Next Action

* = could start

** = do now

Dead-line

Quote

Hrs not billed

Dodgy Bros

EDWARDS Orchids for Fun and Profit

correcting

1st prfs

sent 1st prfs

5 June

collate 2nd prfs

due 1 Aug

8 Aug

6.5

Camford UP

HEINZ

Sociology of Sociology

waiting

rev MS

ph BM

2 Aug

edit MS

due 15 Aug

23 Sept

2000

3

Bench Press

CHAN

Exploring Computers

MS

waiting acxn

em auth

30 July

incorp acxns

due 8 Aug

12 Aug

1800

22

Ten Steps

The ten steps of the editing process are listed below. They apply only to copy-editing; structural editing requires a completely different approach. The advice given here is for the sort of job that comes with the usual optimistic instruction 'It's just a straight copy edit—shouldn't need much at all.'

Some of you may be shocked to find I go through the text sequentially and in detail only twice. But of course the 'First Go' and the 'Second Go' are notional. In fact, 'First Go Bibliog' may actually mean going through the bibliography three or more times:

- Read each entry completely
- Having noticed a problem with punctuation of authors' names, go through looking only at those
- Having noticed a problem with the capitalisation of titles of books, go through reading only the italic
- Check alphabetical order.

Similarly, you might go through the text entirely as part of the First Go just to check the abbreviations, or at the end of the Second Go to check the paragraphing.

On every job, as I finish, I wish I could go through one more time to make it really good. But the publisher won't thank you for perfection, and in the end the readers won't pay you for it.

Not every book is a Rolls Royce. I seem to spend most of my time working on Commodores—and occasionally I'm asked to produce a Commodore from material that is the textual equivalent of a ride-on mower.

1 Appraisal

What have you got? What haven't you got? What do you need to know?

A great lump of paper arrives on your desk. Where do you start?

First, separate the MS itself from the papers concerning it—the editorial brief, correspondence, reader's report, sample setting, author questionnaire. Look through these papers to get an idea of the project. It's important to find out, for instance, whether this is a book of papers that emerged from a conference, or a biography the author has been working on for twenty years. Take all the papers concerning, and put them in a manila folder. This is the file.

Then identify the prelims, separate them, look through them. List any missing items, such as acknowledgements or list of illustrations. Put the prelims aside. Then find out what else you've got—artwork, captions, appendixes, etc., and again note what's missing.

Now you're ready for the text. Flick through the whole thing, forming an impression of the author's methods—do the headings look okay, are there tables or pix included in the text, are the quotes set down or run on? Read a bit of the introduction or first chapter to see how it begins.

After all that, you finally read a sample of the text. Select thirty or fifty pages, and note the time; then read them, editing in pencil as you go. This will give you an idea of how long the editing will take. For this exercise don't select the first or last chapter, because they're often anomalous, quite different in style from the main part of the text. Chapter seven is a good one—the author's usually well into his stride by then.

On screen, the processes are different, but you arrive at the same result. First, as soon as you insert the disk into your disk-drive, run a virus scan on it. Then copy everything on it to your hard drive, remove the disk and store it in a safe place. This is your original copy and you may need it if disaster strikes. On your hard drive, open every file and check for compatibility problems. Check whether the author has applied styles. Then, just as you would on paper, look through to check the headings and so on, and edit a sample to judge the quality of the writing.

You now have a picture of the job and how much work has to be done. This step should have taken you no more than three hours.

At this point it's usually necessary to clarify the editorial brief. You'll have questions about style and about production methods—how much can be left to the typesetter? You'll have to confirm the schedule. At this time also, ask about any missing copy—acknowledgements, permissions, bibliography. Who is responsible for producing the copy, and is it your job to chase them?

When you've obtained answers to these questions, you're in a position to give a quote. Quoting is a whole workshop in itself, so I'll cover it briefly here. I have a sheet of paper with the ten steps listed, as you have them in front of you, together with subheadings according to the particular job. Against every task I write an estimate of the number of hours it will take. Add them up, and add a 10 per cent fudge factor—you have to allow for unforeseen problems, because it is their nature to be just that, unforeseen. Multiply the total by your hourly rate, and that's your quote. If it looks outrageous, go back and be more hard-headed about the number of hours for each task, but don't be unrealistic.

If you're a freelancer, there is no need to tell your client your hourly rate. Insist on quoting on the actual job. Never give firm quote unless you have the complete job on your desk. If all you have is a sample, give rough estimate instead, and stress that you cannot be held to this

figure. If extra tasks that were not included in the editorial brief become necessary during the editing process—such as writing captions—negotiate extra payment. When I give a quote, I name a figure plus or minus 10 per cent, and I make sure to give the publisher the benefit if I finish in less time than expected, just as I expect to be paid the maximum if the job goes to the limit.

2 Mark-up/Apply styles

Distinguish text from non-text

The traditional method of distinguishing non-text items—quotations, boxed text, tables questions, exercises, and so on—is colour coding, ruling coloured lines in the left margin. I go through and do this as a separate operation, reading just enough to identify the various elements. At this stage I'm concentrating on the typography rather than the words. In a MS that uses the author–date or Harvard system of referencing, I also use a highlighter on the references in the text, so I can later check them against the list of references. You don't expect to find everything that has to be marked at this stage, but you do all the obvious stuff.

As part of the mark-up I mark the headings, but I don't grade sub-headings at this stage unless the author's scheme is really simple and consistently applied. Instead, I mark a circle next to each sub-heading, to identify it as a heading. Later in a separate operation I come back and grade them as A, B, C etc.

Colour coding is a good job to do when not you're not feeling very bright—it's a Friday-afternoon job, if you can manage it. Depending on the MS and the time of day and my mood, I may intersperse mark-up with the next step, the First Go through the text, chapter by chapter.

On screen, the equivalent to mark-up is applying styles. For the headings, I often use the default headings in Word—Heading 1, etc.—to identify them as headings, and come back and refine the system later, using global changes to apply custom headings. This has two advantages: you can use the keyboard to apply the default heading styles, which is quick; and you can use Document Outline to edit the default headings before you change them to custom headings.

When working on screen, it's important to save every few minutes, preferably at the end of every paragraph. Because Word makes a temporary file for each save, it's a good idea to close Word every hour or so to consolidate the temporary files.

If you're using a keyboard, you must guard against RSI. One way to do this is to learn to use the mouse in your left hand. This spreads the repetitious movements more evenly between your two hands. With your left hand on the mouse you can move around the screen, you can select text, and you can move text. Meanwhile your right hand hovers over the punctuation and delete keys. This is a very speedy way of editing. But remember that, all things being equal, the keyboard is quicker than the mouse. You can learn the default keyboard shortcuts, or you can customise them with Tools/ Customise/ Commands/ Keyboard.

3 First Go text

Identify problems, solve all the easy ones

Your aim at this stage is to keep moving through the text fairly fast. You are trying to identify all the problems, solve everything uncontroversial, and query or note everything else. In the First Go, you do obvious things like correcting the style of dates, spelling out 'per cent', fixing the end punctuation in relation to closing quote marks. You do any bits of mark-up that were missed. You do the easy and obvious language editing, correcting grammatical mistakes and wrongly used words. You can do some of the capitalisation at this stage, especially in the later chapters.

Everything that can't be solved quickly you mark for later attention. So if there's a paragraph of knotty prose that I can't disentangle quickly, I pencil a wavy vertical line in the margin, or if

there's a suspect spelling of a name, I circle it in the text and pencil a question mark in the margin.

All queries are marked in pencil, so they can be removed later. I find it useful to position queries and instructions in a systematic way. Any query that has to be referred to the author, I mark in the left margin of the MS. Anything I think I can solve, I mark in right margin. Similarly I always mark the location of pix and tables in the left margin. When you're looking for these marks, for instance to check that the table numbers are in sequence, you'll find them much faster if you know where to look, instead of having to scan the whole page, and read and dismiss all the irrelevant marks.

On screen, I use the Comments function for queries for the author, and xxx in the text for queries that I must attend to. At this stage, also, it's important to make global changes. As we all know, enthusiastic application of global changes can have unintended consequences; make them early, so you can detect any surprises in a later reading.

4 First Go everything else

You now repeat this process with all the other parts of the MS besides the text. You read fairly fast through the notes and bibliography, identifying all the problems and solving the easy ones. As I said, First Go through the bibliography, for instance, may actually require three or four passes. Then you check the notes against the bibliography and against the text, and note any discrepancies. If you're working with the author–date system, you check the highlighted references in the text against the list of references.

Similarly, you work through the tables—if there are more than two or three, remove them all from the MS, put them together and work on them together to ensure consistency. If there are illustrations, go through the artwork and the captions, compile an artwork list and list of illustrations, and check that permissions have been obtained.

As a separate operation, you go through the headings—all the chapter headings and sub-headings. You edit them for sense and style, grade them, and check them against the contents list. And similarly, you do a First Go through the prelims.

5 Second Go all

Solve all possible queries

You now repeat the whole process for each part of the MS, but this time your aim is to solve everything you possibly can. Now you've removed most of the distractions—misspellings, grammatical mistakes, stray capitals, etc. —you can put yourself in the position of the reader. You can concentrate on the sense of the text, and you can take a broader view. At this stage you pick up inconsistencies and contradictions in the story or argument.

You solve all the queries as you go, though you will usually find a few that are too hard. If a query or a passage of text is really holding you up, leave it. At the end you'll find you have half-dozen or so really difficult ones: being nearly at the end of the job, you can tackle them in a determined frame of mind, and either solve them or decide to refer them to the author or designer.

On screen, don't make any global changes at this stage because this is your last read. You can still do a Search and Replace, where you check every instance before you change it, but any errors introduced by global changes at this stage will not be detected.

6 Compile author queries

The presentation of author queries varies with the production process. The easiest method is to send the author the edited MS with your pencilled queries in the left-hand margin. Of course you solve all your own queries and remove them before you send the MS to the author.

The most time-consuming method of preparing author queries is to type up a list. If you have to do this, don't refer to line numbers. It's quicker to refer to the top, middle and bottom of the page as a, b, c, so 118a signifies a query at the top of p. 118. Be sure to explain to the author that you're using this system.

On screen, use the Comments function. The default style for the Comment reference in the text is very small and hard to see, so you'll probably want to alter the default style to about 14 pt bold to attract the author's attention.

7 Documentation, extra copy

Prepare design brief, fill in forms, prepare copy for running heads, prelims

This step can be delayed, or you may combine part of it with the previous one. You will probably want to send the author the copy you have prepared for the list of abbreviations, for instance. If you're pushed for time, you can send off the author queries and leave most of the documentation until you finalise the MS, at step eight or nine. But it's better to complete the documentation as far as possible just after you have finished step six, while everything is fresh in your mind.

The documentation includes a style sheet listing particular spellings, capitalisation, and so on. for the MS, which I'll discuss in a moment.

You must also prepare a design brief, which is a description of the MS for the designer—how many pages or files, what styles are used, the heading grades, special characters needed, the number and type of illustrations, etc., and any particular points about an awkward table or list, and poetry and other special layout. Remember to explain the colour coding you have used. The design brief may also include a note to the typesetter concerning global changes to be made, or you may fill in a detailed type spec.

The extra copy includes copy for running heads, possibly a list of illustrations for the prelims, a list of abbreviations, a glossary, a blurb.

At this stage also it's wise to reread the editorial brief, just to make sure you have done everything that's asked.

Putting the job aside

Now you have to put the job aside until you hear from the author. You may not look at it again for weeks or even months. Whenever you put a job aside, for this or any other reason, write yourself a to-do list. After some time has gone by, you'll forget that you were going to supply the latest figures in Table 6, or check up on that publication date in the bibliography, or do an extra check on the captions. Make a list of everything that's still to be done, and place the list on top of the MS so you can find it quickly.

8 Incorporate author corrections

The method of incorporating the author's corrections depends on the production process. On paper, you copy them in by hand; on screen you make the changes on the disk.

Incorporating author corrections involves comparing two versions and changing one of them. The same situation arises with proofs: you have to collate all the corrections onto one copy. I find it useful to keep the version I'm changing - the one I will write on—directly in front of me, and turn the pages to the right. The version I'm referring to is to my left, and I turn its pages to the left. This system prevents you from mixing up the pages of the two versions, which can be a very time-consuming mistake.

Similarly, when comparing two versions on screen, I use a split screen; the version I am changing is always the one at the bottom, and the version I'm referring to is always the one at the top. This prevents me from making changes to the wrong version of the document, again a time-consuming mistake.

9 Final check all

Remove all unwanted marks from MS, complete documentation

After you've made all the changes that the author wants, you're almost finished. This stage I call the final check. I go through every page of the MS and all its bits and pieces. I make sure that any instructions and remaining queries are legible and intelligible, that they're circled (meaning 'do not set'), and that they're labelled appropriately for the author or the designer or the typesetter. (Of course, we hope that there won't be any queries for the author at this stage, but occasionally there are one or two points that have to be updated in proof.)

Make sure there are no unwanted marks remaining. Very often you will query, say, the spelling of a name in five places. When the author sends corrections, you correct the two that are wrong, but often you don't remove the query mark against the three that are right. It's important to remove these marks, because they slow down everyone who handles the MS. In traditional production, the designer, the typesetter and the proofreader will all scratch their heads over these marks and think, 'Does this apply to me? Am I supposed to solve it?' Nor do they want to read a dialogue between you and the author about some point that is now resolved. Such marks really slow up the process for everybody all along the line. It's up to the editor to cross out or erase all queries that no longer apply.

On screen, similarly, you check for xxx or whatever you have used to mark queries for yourself, deal with them and erase the query marker. At this stage also, and not before, you do a spellcheck and remove double spaces. It's important to do these two operations last, because you can introduce errors as you incorporate the author corrections.

At this stage also, you check all the documentation and make sure it's complete.

10 Despatch/handover

Now you've reached the last step. You write a covering letter, drawing attention to any remaining problems such as outstanding copy. You prepare the invoice, and package and despatch the edited MS.

Collate 1st proofs

I also have a systematic method for dealing with proofs, particularly for collating first proofs.

First, I transfer the author's corrections to the proofreader's set, so that I have everything on one set of proofs. If an essential author's correction creates problems—for instance, alters the pagination—I make the correction in ink on the proofreader's set and add a mark in pencil to remind me to make compensating changes later.

I then go through the proofreader's set, looking at the proofreader's corrections to make sure they're necessary and desirable and don't raise problems with copyfitting. At the same time I deal with the proofreader's queries. On this pass also I solve the problems raised by the author corrections—in general, I aim to fix every problem except the half-dozen or so that are really too hard.

Then I check the prelims. This is quite a complex task. I'm sure you're familiar with the rule that says 'The larger the type, the easier it is to miss a typo.' A typo on the title page is very embarrassing, believe me. You'll need to check that the page numbers given in the contents list and the list of illustrations are correct by turning to the relevant pages. There are a lot of things that can go wrong in the prelims—pagination, folios, running heads—so check and double check.

Make a separate pass through the text and endmatter to check the headings. For every book, check the running heads. If the book has a complicated scheme of sub-headings, go right through checking nothing but the sub-headings—grading, wording, capitalisation. Depending on the book, you may have to make several separate passes to check the tables, pix and captions.

Then you make another pass to check the typography. Look at each page for widows, orphans, rivers of white space, hyphens at the end of a page. As you do this, ensure all queries are answered and—as with the edited MS—remove all unwanted marks.

Just to be sure, check the prelims one more time. If there are any really serious problems in the proofs, tag them for the designer or production editor, and list them in a covering letter. Then you can invoice, package and despatch.

The desktop

To give you a complete picture of my method, I'll describe the layout of my desk, which I realise is very rigid and systematic. This really reveals me as obsessive-compulsive, but most editors are. My inflexible layout has an advantage: no matter what job I'm working on, I can put my hand on any part of the MS with ease. Naturally, I'm not suggesting you follow my plan in detail; I'm just demonstrating how to apply a system in order to be more efficient.

In the top left-hand corner of my desk is the file, in a manila folder, with the prelims on top of it. Next to them are the chapters yet to be worked on; immediately in front of me is the chapter I'm working on; to the left the chapters I have already read. To my right are my pens, ruler, white-out, and the style sheet and the running sheet, which I'll explain in a moment. Off to the right are the illustrations, captions, appendixes and other bits and pieces. Beyond them the system breaks down and there's a bunch of used coffee cups, personal mail, unpaid bills and other debris which we won't examine.

The word list

A word list or style sheet is kept for every job, detailing the spellings, capitals, hyphens, etc. peculiar to the MS. Traditionally this has been called the style sheet, but since Microsoft Word has hijacked the word 'style', I'm starting to refer to it as the word list to prevent confusion. If you're working on screen you can keep the word list on paper, or you can have it on screen, keeping it open in another window so you can refer to it easily.

On paper, some people rule their word list into twelve or twenty-four boxes; I use six, but you can suit yourself. On the bottom of it I scribble notes about things I have to tell the typesetter—en rules for dashes, curly quotes for straight quotes, etc. Make sure you write the author's name and the title in the top left corner of the word list. In fact, always write the author's name and the title on any documentation or separate part of the MS—nothing is more demoralising than to find a word list, or an index, or a record of a phone conversation, and not know which job it refers to.

The running sheet

The running sheet never had a name until I began to prepare this talk, because I've never mentioned it to anyone. It's just a sheet of paper that I have for every job, and can't manage without. It lists the ten steps, with sub-headings appropriate to the particular job, and the number of hours I expect each task to take. As I've said, I prepare it for the quote, and I keep it by my side during the job to monitor my progress. Thus if I've estimated six hours for 'First Go text' and I find it actually takes ten hours, I know immediately that I have a problem, and I have to renegotiate the job with my client; if I find that I'm lingering too much on the Second Go—enjoying the book too much—I can press on a bit faster, or resign myself to losing money on the job.

I add other information to the running sheet as the job progresses. I scribble on it general points to be raised with the author, with the designer, and with the client. These notes form the basis of the author queries, the design brief, and the covering letter. I also note extra tasks that I see are necessary, such as checking the paragraphing throughout, and adjust the hours to allow for them. And I jot down major, unusual problems—a table that has to be reworked, or renumbering of the pix in chapter 5, all the 'too hard' ones that need special attention. When I'm putting a job aside and need a to-do list, I generally write it on a spare corner of the running sheet, so that I can gain a complete picture of the state of the job from

this one piece of paper. With the running sheet in front of me, I can answer desperate phone calls about missing captions or tasks not done in a calm, professional manner, even if I haven't looked at the job for a month.

Handling the MS

I'll also say a word about the physical handling of paper MSS. Again, I'm obsessive about the shape of my MS. I like it to be a solid block of paper, with the edges as tight as if guillotined. You stack paper like this for the printer and the photocopier, do it for yourself too. It makes the MS much easier to work with.

With the MS in a solid block, I can see the edges of the coloured sheets that I use to separate the chapters. This enables me to find any chapter quickly and see where it begins and ends, which is particularly valuable if the notes are presented at the end of each chapter. With the MS in a solid block, I can riffle the pages with my thumb to find either a particular author query in the left margin, or a query to myself in the right margin. Much of editing consists of checking and cross-checking—was that name spelt that way last time, wasn't it 1993 when the minister resigned, and so on. If you set up your work so that it's easy to cross-check, you're more likely to do it.

Whenever I have to refer to another part of the MS—a previous chapter, a list of captions or whatever—I take my ruler and place it across the chapter I'm working on. Then I open up the other chapter on top of the ruler, to look for the relevant spot. This saves getting pages from the two chapters mixed up, which can be a time-consuming problem, as I've said.

I'll just say a word about the use of tags. Large numbers of tags devalue the currency and become counterproductive. Nothing makes my heart sink like a 300-page set of proofs with 250 tags. As I've said, in collation of proofs you go through every page of the proofs several times, and check every correction and query. It's a complete waste of time for the proofreader to apply all these tags, and in fact it shows ignorance of the production process. Tags should be used to draw attention to particular, serious, unusual problems, not to every routine query and correction.

On screen, I'm still developing my processes for handling MSS. I have a directory for each publisher, and I name all my files by the author's surname, or the first few letters of it, plus standard abbreviations. Thus 'Smith-aqq2' is a second round of author queries on the Smith MS; 'Smith-desbrf' is the design brief, and so on. The actual MS is in a folder of its own, called xSmith, so I know it's the manuscript itself and not papers concerning it. Within that folder I use 'Save As' at the end of each stage, so it will contain files called 'Smith1', 'Smith2' or 'Smith-orig ms', 'Smith-ed ms' or whatever. As far as possible, I prefer to have the whole text of the MS in one file, rather than a separate file for each chapter, because I'm more likely to make global changes and cross-check thoroughly in the file I'm working in. It's tedious to have to open a dozen files every time you want to make a global change or a Search and Replace.

Backing up is a chore, but re-doing a day's work is a worse chore. I use a Zip drive, which is very fast and makes back-up pretty painless. Do a back-up after every session, and at the end of each day do an extra back-up and put the disk in another room. Ideally, every month or so you should do a complete back-up of everything and store it off-site—say, at a friend's house—in case of total disaster.