

Paperless Proofreading: A Publishing Revolution

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As publishers shift toward electronic manuscript-processing systems, the editing process is increasingly paperless. For copyeditors, who have been editing documents electronically for years, the change is mostly procedural. For proofreaders, however, the electronic age of editing means tackling new responsibilities in a different medium.

Proofreading in a Nutshell

Traditionally, a central duty of the proofreader was to compare keyed copy with the author's original to make sure that no errors were introduced in the typesetting process. Another component of proofreading has customarily been reviewing hard copies of composed pages to ensure that such design elements as column alignment, spacing, and line breaks meet the publication's specifications. Even light copyediting responsibilities—such as checking spelling, grammar, and punctuation—fall under the heading of proofreading at times.

At Allen Press, in Lawrence, Kansas, proofreaders perform a variety of tasks. "For material typed from hard copy, they do a comparison, word-for-word proofread", says Allen Customer and Composition Editorial Services Division Director Susan Metzger. "For files that come in electronically, the bulk of the material we receive, we do a quality check. That includes proofreading the title and authors and then doing a check on the rest of the galleys, which includes checking line endings, spacing between heads, loose lines, anything out of the ordinary. For jobs that we copyedit, they do what we call a pseudoproofread; that is, they read it word for word, but, because the file is copyedited

online, they have nothing to compare it with. During this proofread, they check for typos, spelling, subject-verb agreement, style points, and so on."

"When I proofread", says freelance editor Dana Sacks, "I am, of course, looking for grammar, but also for style. I believe that proofreaders need to look for things that are 'off'. Are the sentences complete? Are the tables where they need to be? It also depends on what the client wants. Sometimes proofreading can be checking for style—changing words. Other times, it's just looking for grammatical mistakes. It all depends on who is paying you."

The e-Revolution

According to freelance editor John Sealine, formerly a managing editor for new journals at Cadmus Professional Communications, "with the change to electronic manuscripts, the text is edited on the screen, and the original keystrokes of the author have been captured; thus, there is no proofreading in the traditional sense. What the copyeditor submits to composition is the final version, as correct as the author submitted and improved or corrected by the copyeditor. There is no in-between typesetter whose keystrokes must be checked by a proofreader."

For many publications, the hard-copy component of the prepublication process is being phased out. Manuscripts are submitted and edited electronically, and galley proofs that used to take hard-copy form are now available electronically in PDF (portable data format). At the *Journal of Clinical Oncology (JCO)*, in Alexandria, Virginia, explains Copyediting Manager Doug Parker, proofreaders perform light copyediting on hard-copy proofs. In the past, their notations have been returned in hard copy, and in-house copyeditors transferred them to clean hard-copy pages for return to the compositor. Now, the copyeditors work completely electronically, and

proofreading is the only part of the editing process that occurs on paper.

What does this transition mean for the relevance of paper proofreading? The publication process for many publishers is more and more completely paperless, and a move to electronic proofreading is a logical byproduct of that evolution. Says Parker, "we recently surveyed our freelancers regarding their potential ability to perform the function electronically. It would fit well with our in-house workflow, reduce the costs associated with trafficking hard copy back and forth, and allow for a quicker turnaround of work. I anticipate that we will transition to such a workflow for JCO over the course of the next year."

As a former Lippincott Williams & Wilkins (LWW) account manager, freelance proofreader Trudy Rutherford has already had experience with the electronic proofreading workflow. "At LWW, we had a journal customer who wanted to do electronic proofing, and I had training and did some articles to familiarize myself with the process." She used a PC and Adobe Acrobat software to make editorial changes and received files via e-mail.

"I mainly use Microsoft Word on my home PC. I look at grammar, style, and so on. Sometimes I've received Adobe documents to look at. Sometimes I've had actual text files to look at", says freelance technical editor Alison Weiss. "I mainly receive and send documents via e-mail. Sometimes I download them [from an] FTP server. Sometimes the documents are viewed via my customer's Internet-based system, but I generally communicate via e-mail with attachments."

Parker anticipates that eventually his copyeditors and proofreaders at JCO will all receive and return their manuscripts through the Bench>Press electronic manuscript processing system, and proofreaders will annotate PDF documents. "In the past, our copyeditors picked up

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manuscripts through an FTP site”, Parker explains. “The short-term vision for the proofreaders is the FTP option, but our long-term goal is to integrate them into the Bench>Press system for a completely paperless workflow.”

Pros and Cons

The consensus is that a transition to electronic proofreading will reduce the time and expense of hard-copy proofreading for most publishers. But are there disadvantages, too? According to Rutherford, one major advantage of a paperless proofreading workflow is “savings for shipping costs of proofs to proofreaders, which helps to reduce the turnaround time, especially with journal schedules getting shorter and shorter”. However, she says, “after [my LWW customer and I] completed our trial articles, we both felt it was a cumbersome process. Serious reading of several articles on the computer is tedious to the eyes. In addition, we felt limited in its use—you can take hard copy with you and don’t need to be in front of the computer”, and for many freelancers, the portability of hard-copy proofs is a major benefit.

“[Electronic proofreading] is cumbersome for the freelancers and makes them cranky”, says Anne Seitz, co-owner of Hearthsides Publishing Services, a small, Pennsylvania-based production services company that specializes in medical and academic publishing, working primarily with overloaded major medical and college textbook publishers. “If [the proofreaders] aren’t happy, I’m not happy”, she says.

Some freelancers get around the necessity of working only in front of a computer by proofreading on paper even when they receive electronic documents. “Before I send it back to the client, I print it out and read through it one more time”, says Linda Harteker, a freelance editor and a copyeditor for *Science News* magazine. “I find that looking at the hard copy makes it possible for me to find many things that I miss on screen. The errors I find at this point are both small (such as double periods and extra spaces) and large (such as formatting issues and consistency of font).

Tools of the Trade for Electronic Proofreading

Hardware

- PC, or Mac with reliable PC compatibility.
- High-speed modem or cable Internet connection.
- Electronic stylus for “writing on” PDF documents.
- Mouse.

Software

- Word-processing software.
 - Microsoft Word (preferred).
 - WordPerfect.
- PDF-editing software.
 - Adobe Acrobat suite (preferred).
 - ScanSoft.

Having the copy in hand enables me to easily page back and forth in the document to look for consistency. . . . That is hard to do online.”

Apparently, Harteker is not alone. “We have been unable to find a proofreader who will read electronic files without printing them out”, says Seitz. “Proofreaders who have tried it complain of eye strain, headaches, and stiff necks and shoulders. [They] cannot sit for hours and read on screen. Therefore, it slows down the process. Proofreaders request more money to read electronically because either they are printing out the material or it takes them much longer to read electronic files.”

A Question of Quality

Electronic proofreading holds the potential for faster work, but what about better, or equally good, work, compared with hard-copy proofreading? “The inherent issues of having a typesetter sometimes misread your handwriting or simply introduce typos are eliminated”, says Sealine. “Using many of [Microsoft] Word’s search and replace tools makes for more accuracy. Word can also be customized if you are clever enough to do it. This is a huge advantage.” When it comes to proofreading PDF documents, some software, such as Adobe’s Acrobat suite, allows essentially the same functionality as Word.

Freelancer Linda Long disagrees. “I think

online editing is preferable to hard copy for copyediting because it gives you so much more leeway to change things around with minimal mess and effort”, she says. “But proofreading is a different animal. I can never really tell whether tiny stuff, like periods, is right. Maybe an online proofreading that is always followed by a quality-control go-through would work, but the human eye can pick up only so much on the screen.”

Despite the potential cost- and time-saving advantages of electronic proofreading, Metzger agrees with Long. “I don’t think electronic proofreading is as good as reading on paper, because things can get missed, and it’s easy to lose your place”, she says. “There would also be the issue of training to annotate PDFs for return of proofs to authors and editors.”

But for some folks, like Sealine, the electronic workflow is a good move across the board. Freelance and former in-house *Journal of Biological Chemistry* copyeditor Carolyn Akehurst says electronic proofreading is faster, makes it easier to maintain consistency, and provides easier access to support than hard-copy proofreading. And, says Akehurst, “it should mean more business for copyeditors and proofreaders in the long run. People eventually recognize [that] the spell checker is not a replacement for the copyeditor or proofreader. I am amazed by how many people in the industry think

a spell checker is the tool for a perfect paper.” Electronic proofreading allows publishers to take advantage of editing technology and individual attention and expertise.

Money Makes the World Go Around

As proofreading processes evolve, so does the specialized knowledge required to use them. Does that mean that electronic proofreading, with its expectation of specific computer skills and requirement for particular equipment and software, should command a higher rate than hard-copy proofreading? For Akehurst, who is accustomed to receiving a lot of support for electronic proofreading in the form of a company keyboard and toolbars and software for journal-specific editing programs, “higher quality, higher quantity, and personal contact [with clients] via e-mail indicate more money”.

Parker believes in equal pay for equal performance. “I think the rate should be similar”, he says, “as long as the essential functions remain the same. There is no reason to place a higher value on the function just because it is performed electronically.” But do the new procedures inherent in electronic proofreading constitute a change in function? Metzger thinks so. “I think it would probably warrant a higher rate because of the need [in some workflows] to know how to annotate PDFs”, she says.

For Rutherford, the work is slower, and that means a higher rate. But if electronic proofreading became the norm, “I would be out of business because I do not wish to do electronic proofreading. I do not have a computer. I do all my e-mails and Internet

searching through WebTV, so I would need a computer, software, and minimal training.” With her LWW electronic-proofreading experience under her belt, Rutherford will have to learn less than a proofreader who has never done it before, but the shift would still require a major investment for her.

Sealine takes a different approach to the question of pay for electronic proofreading. “It all comes down to what one defines as ‘the page’. In the old days, a page of paper was pretty standard, as long as you could insist on double-spaced copy on an 8.5-by-11-inch page. Sometimes you’d get single-spaced copy, but then you could just double the rate”, he explains. “However, how can you be sure that the project you are given electronically is actually 12 pages? There is a trend toward counting text by word count or even character count instead—or even bytes. I think that might be the way of the future.”

Putting It All Together

With the growing paperless trend in the publishing industry, it is no longer a question of whether electronic proofreading will become prevalent, but rather when. All-electronic manuscript processing systems, such as eManuscript and Bench>Press, are simultaneously revolutionizing the industry and making it obsolete. It seems that proofreading will always have a place in the production process, but what it encompasses and how it happens are in the midst of a major evolution. ☞

A Paperless-Proofreading Primer

Tips for Electronic Proofreading

1. Use your resources. Ask your clients to provide you with all available tools to help you complete the work to their specifications: style sheets, company- or publication-specific software, access to the organization’s internal network, a direct contact for technical support, and anything else you can think of.

2. Equip yourself. Be sure that your current software is up to date and up to snuff. Microsoft Word (with its Track Changes) is pretty much a necessity, and Adobe Acrobat 7.0 (which allows you to edit PDFs) is strongly recommended. You may also want to look into purchasing an electronic stylus, such as the cordless iPen, for writing directly on PDFs. Last but not least, a high-speed Internet connection will make file transfers significantly easier.

3. Electronic means electronic. Although electronic proofreading may seem slower in the beginning, you’ll increase your speed as you get more familiar with it. Resist the temptation to print the files, proofread on hard copy, and then transfer your corrections—you’ll be doing the same work twice!

Terms to Learn

1. PDF (portable data format)—A PDF document is basically a snapshot of a document that allows anyone with a PDF reader to view the document even without owning the source software. Adobe and ScanSoft are the leading manufacturers of PDF-viewing and PDF-editing software.

2. FTP (file transfer protocol)—An FTP site allows back-and-forth file transfer without use of e-mail. After logging in to the FTP site with a user name and password, an editor can “pick up” clean files and “drop off” edited files by dragging and dropping from his or her hard drive. This means that you don’t have to worry about your e-mail provider’s rejecting large attachments—you physically put them on your computer from the FTP site.

3. VPN (virtual private network)—A company’s internal file-storage system, also referred to as an intranet. When you have full access (sometimes called tunneling) to a client’s VPN, you have access to all the files and electronic resources that an in-house employee does, and often the software as well.