

Author-Friendly Onscreen Editing

Circa 1999, phone call from a long-time client:

CLIENT: Hi, Stephanie. I've got a really important paper coming up, and I wonder if I could reserve some time on your schedule.

ME: I think so. What time frame are you thinking of?

CLIENT: Well, I'm thinking. . . . You know, I just really appreciate your work, and I want to make sure that you can edit this.

ME: Thank you! Yes, that timing should work well for me.

CLIENT: I'm glad. You do such a better job than some of the other editors I've worked with. I mean, your handwriting is just so clear!

As you can imagine, that last comment was a bit of a bubble burster! As we talked, I was imagining that the client was impressed by my skillful editorial corrections and insightful suggestions. And he must have been satisfied or he wouldn't have kept coming back to me. But what he cared about most was that he could actually decipher my recommendations.

Today, I do almost all my work electronically, using revision-tracking software, so the legibility issue is moot. But I think there's still a "good handwriting" aspect to working electronically.

Importance of "Good Handwriting"

There are at least two ways in which we have to be competent with whatever electronic revision-tracking software we use. First, we have to be proficient in using the features of our software—for example, we have to know how to navigate around a document quickly, use Search and Replace effectively, automate or streamline some repetitive tasks, turn revision tracking on and off, control how tracked revisions appear, and have some idea of the software's limits and weaknesses. Second—and this is the "good handwriting" aspect—we have to present our editorial recommendations in a way that makes them easy to understand and implement. The first set of

skills makes our lives easier. The second set of skills makes our authors' lives easier and can help us maintain good author–editor relationships.^{1, p 164–166, 172–174}

One book in particular has greatly increased my appreciation of the importance of editing electronically in a way that makes the author's task easier: Geoff Hart's *Effective Onscreen Editing: New Tools for an Old Profession*.¹ I've also found helpful advice on author-friendly onscreen editing in Hilary Powers's *Making Word Work for You: An Editor's Intro to the Tool of the Trade*,² Carol Fisher Saller's *The Subversive Copyeditor: Advice from Chicago (or, How to Negotiate Good Relationships with Your Writers, Your Colleagues, and Yourself)*,³ and Amy Einsohn's *The Copyeditor's Handbook: A Guide for Book Publishing and Corporate Communications*.⁴ Each of these books offers a wealth of excellent advice in exchange for a modest economic investment.

Recommendations

In this first of two columns on onscreen editing, I'll outline some advice for starting off well. In the next column, I'll turn to the nitty-gritty details of marking revisions on screen.

Decide with the author which changes to mark. The first time you work with an author, ask whether the author wants you to mark every change, everything except formatting changes, everything except formatting and punctuation changes, or something else. Some authors want to see every change to their documents; others strongly dislike having to review multiple minor punctuation and format changes. (But also see the next paragraph, about changes that can routinely be made with revision tracking turned off.)

As Saller said, "Don't sneak (much)."^{3, p 16–17} She points out that "some types of uncontroversial changes are not easy to display visually through tracking (such as eliminating double and triple spaces accidentally typed between words), so it makes sense to make them silently" (with revision tracking turned off).^{3, p 17} When you return the manuscript, she recommends, include a list of such silent changes.^{3, p 17} However,

Between Author and Editor

continued

it's best to acknowledge other types of changes even if you acknowledge them only the first time and tell the author that the changes are made silently thereafter.^{3, p 17} If authors detect that you have made changes that aren't tracked or mentioned, they may start to wonder what else you have done under the radar, and that's not good for building trust.

Decide how best to mark your queries. Almost all the authors I work with prefer having queries typed in brackets in line with the text. One client, however, requests that I use Microsoft Word's Comments feature, and I've seen some editors format their queries effectively as footnotes. In-line text, if it's formatted so that it stands out (for example, with boldface or underlining or both), has the advantage of being hard to overlook accidentally and leave behind in the "final" document. Comments and footnotes have the advantage of not visually interrupting the flow of text—helpful if you're working with a document in which the layout is important or you need to make sure that the final document will not exceed a specified page limit. What's important is to make sure that you mark queries in a way that works well for the author and for the particular document that you're editing.

Know your revision-tracking software. Each time you begin using new revision-tracking software or a revised version of your revision-tracking software, imagine that you're an author, and examine what happens when you try to deal with an edited document. How do the tracked revisions look? Does anything strange happen when you try to accept or reject changes?

When I changed to the version of Microsoft Word that I use now, I had an unpleasant surprise. Previously, I had often used highlighting to mark key terms (hot pink, for reasons I've long since forgotten), baffling passages (green), and sentences that needed to be phrased more elegantly (blue). Before returning a document to an author, I would simply select the entire document and click "no highlighting" to remove all the streaks of color.

In my new version of Word, however, I

discovered that highlighting was marked as a formatting change, and "un-highlighting" was marked as one too. Imagine what you would think if you were an author and in one short paragraph with 10 visible tracked changes you also had to deal with multiple instances of a mysterious "Character Property Change"—the results of my behind-the-scenes highlighting maneuvers. If you were in a good mood, you might call me up and ask what was going on. If you were in a bad mood, you might become quite upset. Fortunately, I discovered this problem and figured out how to avoid it before I returned any edited documents to authors. (I turn off Track Changes [this is critical], select the entire document by holding down CTRL and then hitting A, and then choose None from the drop-down list on the Highlighting button on the Formatting toolbar. Those steps remove all the highlighting in the document and also remove all the tracked changes related to highlighting.)

It's a good idea to perform this "put yourself in the author's shoes" exercise after every version switch, because just when you've got your software figured out, the program designers will make changes.

Future Columns

In the next column on onscreen editing, I'll offer recommendations on precisely how to enter proposed revisions in an author-friendly way.

Do you have an anecdote you'd like to share about an author–editor conversation (verbal or electronic) that gave you insight into author–editor relationships? If so, I would love to hear about the conversation and its effect on your editorial approach and to consider

your experience for possible publication in a future column. Please e-mail me at sdeming@mdanderson.org.

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