

# 5 Standards of editing and of proofreading

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## 5.1 Before accepting work as an editor

**5.1.1 Application of general editing skills** Members and associates should take all reasonable care to ensure, by virtue of their skills, training and/or experience, that they are competent to fulfil the expectations implied by use of the words ‘editor’ and ‘copy-editor’. This should include consultation with the client to confirm that the supplier has appropriate, secure, up-to-date computer and communications equipment and software to fulfil the commission. Clients should be able to approach potential suppliers in the reasonable expectation that this is the case.

**5.1.2 Application of level of edit** In deciding how much work to undertake on a text to impose order in terms of style and substance and what level of edit to apply to it (see **5.1.3**), suppliers should consult with and be guided by the client and be prepared to work within the brief.

**5.1.3 Levels of copy-editing** This code subdivides copy-editing into the three levels set out below, but it is acknowledged that a combination of levels may be appropriate in certain types of work (eg multi-author works). The supplier should establish that the client understands the difference between copy-editing and proofreading.

*Level 1: technical* This is non-intrusive copy-editing and the basic mark-up for the typesetter. The client wishes the material to be prepared for publication but is willing to accept the bulk of the text as received with minimal intervention. Inconsistencies and infelicities are nevertheless dealt with and copy-editing includes the points listed in **5.4**.

*Level 2: structural* This is where more intrusive copy-editing may take place; it can often apply to multi-author works when presentation is uneven. In addition to the requirements of the Level 1 copy-editing, above, the publisher client will have agreed with the author that the text requires structural intervention for clarification. This work constitutes rephrasing as necessary rather than rewriting.

*Level 3: substantive/development editing* The publisher client will have agreed with the author (who is primarily an information provider and not necessarily an experienced writer) that reconstruction and rewriting are necessary in order to adapt the material for its defined market, as well as Level 1 copy-editing and mark-up.

*Note:* At any of the above levels the publisher client may or may not wish the supplier to be directly involved with the author in order to settle queries.

## 5.2 Before accepting work as a proofreader

**5.2.1 Application of general proofreading skills** Members and associates should take all reasonable care to ensure, by virtue of their skills, training and/or experience, that they are competent to fulfil the expectations implied by the use of the word ‘proofreader’. This should include consultation with the client to confirm that the supplier has appropriate, secure, up-to-date computer and communications equipment

and software to fulfil the commission. Clients should be able to approach potential proofreaders in the reasonable expectation that this is the case.

- 5.2.2 Application of level of proofreading** In deciding how much work to undertake at the proof stage, suppliers should consult with and be guided by the client and be prepared to work within the brief.

### **5.3 Responsibilities of the editor and the proofreader**

In exercising their responsibilities to themselves and their clients, suppliers should keep in mind the following points.

- a** The importance of obtaining an accurate brief, including level of copy-editing (see **5.1.3**) and nature of the job, ie whether it is all on hard copy, or hard copy plus electronic files, or electronic files only.
- b** The importance of editorial exactitude, good communication and punctuality.
- c** The importance of obtaining constructive feedback.

- 5.3.1 Brief from client to supplier** Suppliers should ensure that the client supplies:

- a brief that sets out the nature of the projected work, the extent of contact between supplier and author or other contributors and the name of the in-house contact;
- a copy of the client's house style (where applicable).

Suppliers should request a brief where this is not supplied. It is important to make an initial assessment of the brief against the material provided before proceeding to the main part of the work, and in particular to evaluate whether the proposed schedules will allow sufficient time to carry out the requirements of the brief.

The brief should include the points listed in **4.1.2**.

- 5.3.2 Communication between supplier and client**

**a** Good communication, editorial exactitude and punctuality are vital. It is the supplier's responsibility to raise any initial queries with the client. A fundamental requirement in the good handling of any material is to raise major queries without delay, and other minor queries in batches as convenient to all concerned. If any matter in the brief or other documentation or in matters under discussion with the client is unclear, the supplier should seek clarification as early as possible in the process.

**b** Early communication with the designer is desirable, if that comes within the editorial remit, and particularly if the material being edited is intended for a website.

**c** Since the supplier is responsible neither for commissioning work nor for contracting with an author, the supplier cannot be held responsible for questionable material (whether factual or otherwise) or material where possible legal problems (eg libel, infringement of copyright, plagiarism) may arise. However, a supplier becoming aware of any such problems in the material should bring these to the attention of the client. Any duty the supplier has to the client will be fully discharged by this process, and the client, while being guided or advised as necessary by the supplier, bears the whole responsibility for deciding what is to be done in these cases.

**d** The supplier should make every reasonable effort to deliver completed work to schedule and should inform the client promptly if circumstances arise that make delay likely.

e When handing over the work the supplier should detail any material still outstanding from the client and provide for the client's convenience a sheet of style points specific to the work.

- 5.3.3 Feedback** Suppliers should expect to be given constructive feedback from a client on the quality of and level of satisfaction with the completed work. This feedback may be sought following a first assignment from a new client, following an assignment of a different nature from an established client, or at any point in the working relationship where the supplier and client agree it would serve a useful purpose.

## **5.4 Copy-editing printed materials: basic skills**

In the application of all three levels of copy-editing (see **5.1.3**), whether on hard copy or electronically, a copy-editor should be competent in the following skills:

- 5.4.1 Publication** Understand the basic processes of producing a publication.
- 5.4.2 Grammar and spelling** Identify and correct errors in grammar, spelling and punctuation, and in usage and style.
- 5.4.3 Command of English** Possess a good command of English (or the working language) and an awareness of the constant evolution of language. Copy-editors should seek to establish and support good standards of clarity within the context of the work, and be conversant with the intended readership both geographically and in terms of language and understanding. Edit to the appropriate language level if necessary.
- 5.4.4 Consistency** Establish a consistent style for the text; identify and eliminate or query inconsistencies; ensure that house style (where applicable) is followed. Create a copy-editor's style guide that can be passed on to the proofreader to ensure consistency throughout the text.
- 5.4.5 Factual accuracy** Raise questions of factual accuracy and consistency regarding names, dates, events, people, places and references to visual elements as necessary. Refer these to the client or author as appropriate.
- 5.4.6 Awareness of ambiguities, etc** Delete irrelevancies, unnecessary repetitions and infelicities, and be able to correct ambiguities and to read for sense, clarifying as necessary and confirming alterations with the author(s) (see **5.1.3**).
- 5.4.7 Logic of textual structure** Ensure that the structure of the text is logical and consistent, including the hierarchy of headings. Establish and maintain consistency in the marking up of headings, paragraphing, contents page(s) and, where appropriate, running heads, quotations, tables, figures, legends, lists, textual references to notes, footnotes, references, glossaries, bibliographies and any other parts of a text requiring special presentation. Use electronic means to achieve this as appropriate.
- 5.4.8 Author queries** Raise queries for the author and present these intelligibly (not necessarily resolving them – see **5.1.3**).
- 5.4.9 Copy-editing symbols** Use current British Standard copy-preparation symbols and minimal margin notation. However, copy-editors should be aware that not all designers (of either printed materials or web pages) are familiar with conventional symbols. This should be clarified at an early stage, and an appropriate means of marking text agreed.
- 5.4.10 Mark-up** Use mark-up symbols and conventions according to the client's or designer's specification. This may be done on hard copy or electronically, as agreed with

the client. Make appropriate use of templates, style sheets, tags, codes and other electronic processing tools.

- 5.4.11 Handwriting** On hard copy, write neatly and legibly to minimise typesetting errors due to misreading. Unless the client advises otherwise, copy-editors may assume that they are marking up for an educated native speaker of the language in which they are working.
- 5.4.12 Pagination** Understand the use of signatures for layout and, where appropriate (eg if working to a design and a planned extent), adjust text to achieve even workings. Even when the copy-editor is not working to a design, copy should be prepared so as to forestall layout difficulties (eg with tabular and/or graphic material) that could lead to costly corrections at proof.
- 5.4.13 Prelim pages** Understand the conventions for information that must or may be included, and prepare copy as necessary/required.
- 5.4.14 Illustrations** Where applicable, organise and relate illustrations to the text, edit labels and legends in a manner consistent with the bulk of the text and key these correctly into the text. Prepare a list of captions. Prepare artwork briefs if required, using a standard template.
- 5.4.15 Cross-references** Check the presence and correspondence of any cross-references systematically, including inconsistencies in the spelling of names in the text, bibliographical references, tables, figures and footnotes.
- 5.4.16 Index** Understand the basic principles of an index and be able to edit an index.
- 5.4.17 On-screen editing** Where applicable, be familiar with the use of computers in editing, and the principles of on-screen editing (using authors' electronic files) and web-page editing. Where applicable, make appropriate use of a computer for editing and to prepare the document for the design to be implemented. Cultivate awareness of general technological trends that may affect the editorial process.
- 5.4.18 Copyright** Draw attention to elements that require copyright acknowledgement and permission, and know how to seek permissions and prepare acknowledgements.
- 5.4.19 Legal issues** Report to the client any evidence or suspicion of matter which may contravene the laws regarding libel, obscenity, blasphemy, incitement to racial hatred or plagiarism.

## **5.5 Editing websites**

Effective website editing requires the basic skills identified in **5.4**. In addition, the editor may sometimes need to do the following.

- 5.5.1 Editor's style guide** Amend or create a guide that describes the editorial style for all or part of a website.
- 5.5.2 Making content web friendly** To make scanning (which web users tend to do) easier, create sentences and paragraphs that are shorter than the equivalent printed text and insert concise, factual subheadings every two or three paragraphs.
- 5.5.3 Summarising** Write concise descriptive headings and summaries of web pages, which can be used on higher-level pages to link them to those web pages or as file descriptions (metadata) that can be found by a search engine.

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- 5.5.4 Link writing** Rewrite sentences so that the target (internal or external) of a linked word or phrase is clear, avoiding the use of 'Click here' or 'More' wherever possible. Check that all links work and whether the client wishes to include a disclaimer for the content of external sites.
- 5.5.5 Splitting content** Advise on the splitting of content across additional linked pages (modules) to facilitate direct access to those additional pages from elsewhere on the site and from search engines.
- 5.5.6 Multimedia** Access and comment on the functionality of multimedia files integrated with web pages – eg audio, video, animations – and any associated text. Liaise with the author, designer or developer, depending on the editor's content knowledge, to amend these elements if necessary.
- 5.5.7 Alternative descriptions (alt tags)** Write or edit text that describes images, other multimedia elements and links, for use when images are turned off or when a screen reader is being used by a visually impaired user.
- 5.5.8 Site mapping** Create a site map to describe all or part of a website, or add to an existing one.
- 5.5.9 Content management systems (CMSs)** Use the site owner's CMS if one is available. Not only will text be edited within this but also links will be created, images and headings of different weights will be inserted and other tasks will be carried out that, in other circumstances, might be considered the responsibility of the web designer.

## **5.6 Proofreading printed materials: basic skills**

Proofreaders should read first proofs of an edited document against previous marked copy when provided by the client, and second and any subsequent proofs against the preceding proofs. In many cases the proofreader will be required to read 'blind', ie not to read against any previous copy, and so advice should be sought as to whether the client wishes to limit the number of amendments, which are likely to result from editorial rather than typesetting errors.

A proofreader should be competent in the following skills.

- 5.6.1 Paragraphs and pagination** Ensure that the page sequence within the document is complete and that illustrations are present or appropriate space has been allowed. If paragraphs are numbered, ensure that the numbering sequence is correct.
- 5.6.2 Typographical errors** Identify and correct typographical errors, eg misspellings.
- 5.6.3 Editor's style guide** Follow the editorial style guide (the list of spellings etc adopted by the copy-editor and passed on to the proofreader) if provided. If this is not available, compile a style guide while reading the proofs. Do not seek to amend or 'improve' a copy-editor's work unless specifically asked to do so by the client. Errors and omissions should, of course, be corrected or queried.
- 5.6.4 Proof-correction symbols** Use current British Standard proof-correction symbols or terms, and colour coding for corrections (if required by the client) to permit accurate apportioning of costs.
- 5.6.5 Consistency** Identify internal textual, typographical and design inconsistencies, and query or correct as appropriate. Cross-check text with prelims and endmatter, identify inconsistencies and eliminate or query them.

- 5.6.6 Accuracy** Ensure that textual and typographical alterations, including matter brought forward and/or taken back, are made accurately, consistently and cost-effectively.
- 5.6.7 Illustrations** Ensure that captions correspond to illustrations and are consistent with the text. Proofread labels if requested in the brief.
- 5.6.8 Chapter and/or section titling** Ensure that titles in the contents page(s) and the body of the text correspond, and insert page numbers or ensure that, if present, they correspond. Check or query cross-references and illustration numbers.
- 5.6.9 Queries** Clearly identify and list queries and refer these to the client. Ensure that queries made in pencil on the proof are circled, so that the client retains the final decision about which changes to sanction.
- 5.6.10 Running heads** Ensure that running heads are correct and correspond to the convention imposed.
- 5.6.11 Headings** Check that type size, style and fonts all appear consistent.
- 5.6.12 Fonts, alignment and line length** Identify erroneous font changes, misalignments and inappropriate line lengths, and suggest corrected formats. Check alignment of columns in tables.
- 5.6.13 Colours** If reading colour proofs, check that all colours are used appropriately and consistently.
- 5.6.14 Overall page design** Check bad word breaks and column breaks; eliminate widows and orphans if required by the client. In books with a complex design layout (many illustrations, tables etc), ensure that these are placed logically and that the text can be read easily.

## 5.7 Collation

Proofreaders may be required to collate proof-correction marks made by several individuals, eg author, adviser, other proofreader. Where comments are in conflict, the proofreader/proof collator should be able to make justifiable judgements and amend appropriately, to maintain the required quality of the final product, the schedule, the budget and good author relations.

## 5.8 Proofreading online content

Effective proofreading of online content requires the basic skills identified in 5.6. In addition, the proofreader may sometimes be required to do the following.

- 5.8.1 Technology** Use appropriate types of software to access text, images and multimedia contained in any web page that forms part of the work, including browsers and plug-ins.
- 5.8.2 Page mark-up** Agree with the client the method to be used for marking up web pages, eg annotating PDF copies of a page, correcting html files or marking up hard copy using conventional proof-correction symbols. (Hard copy can be obtained by creating and printing out a screenshot of a page, which can then be marked up and scanned.)
- 5.8.3 Communication** Agree with the client or designer a method for communicating corrections or amendments to web pages, eg by emailing marked-up files to a named

contact, using FTP (a file transfer protocol) to transfer files to a location made available for the purpose, or faxing or posting marked-up hard copy.

- 5.8.4 Navigation and page location** Ensure that any navigational controls – eg buttons, drop-down menus, jump-down lists or visual representation of page location – work and that the text on them is consistent with that on the site map and with page titles and/or headings.
- 5.8.5 Multimedia** Download and proofread multimedia files – eg animation, audio, video – against the author’s or editor’s brief to the designer or web developer, paying special attention to captions and titles.
- 5.8.6 Alternative descriptions (alt tags)** Ensure that ‘alt’, ‘title’ and ‘longdesc’ tags are correct and are editorially consistent.
- 5.8.7 Links** Check that all internal and external links work and take the user where intended.
- 5.8.8 Alternative versions** Check text-only and printer-friendly versions of web pages or other versions of the work, eg PDF.
- 5.8.9 Content management systems (CMSs)** If the client has one and allows access, proofread using a CMS and check the effects of your changes on the appearance of each web page.