# The Editorial Process

# Lesson goals

- Know the different reference styles (Harvard and Vancouver)
- Understand the clearance process
- Know the three levels of editing and the difference among them
- Know what a style guide and a branding style guide are
- Know how to edit a document professionally

# Formatting

- **Text:**
  - Word processor (Microsoft Word)?
  - Word limit (does not include ancillary materials)?
- **References:** Format? (see next slide)
- **Tables and figures:**
  - Tables: format (Word, Excel)?
  - Figures and maps: format (Adobe Illustrator, PowerPoint, Excel)?
  - Legend format?
  - Color or black and white?
- **Footnotes:**
  - What program: MS word, Endnote?
  - Footnote symbols: *, †, §, ¶, **,††, §§, ¶¶, etc?

# Two reference styles

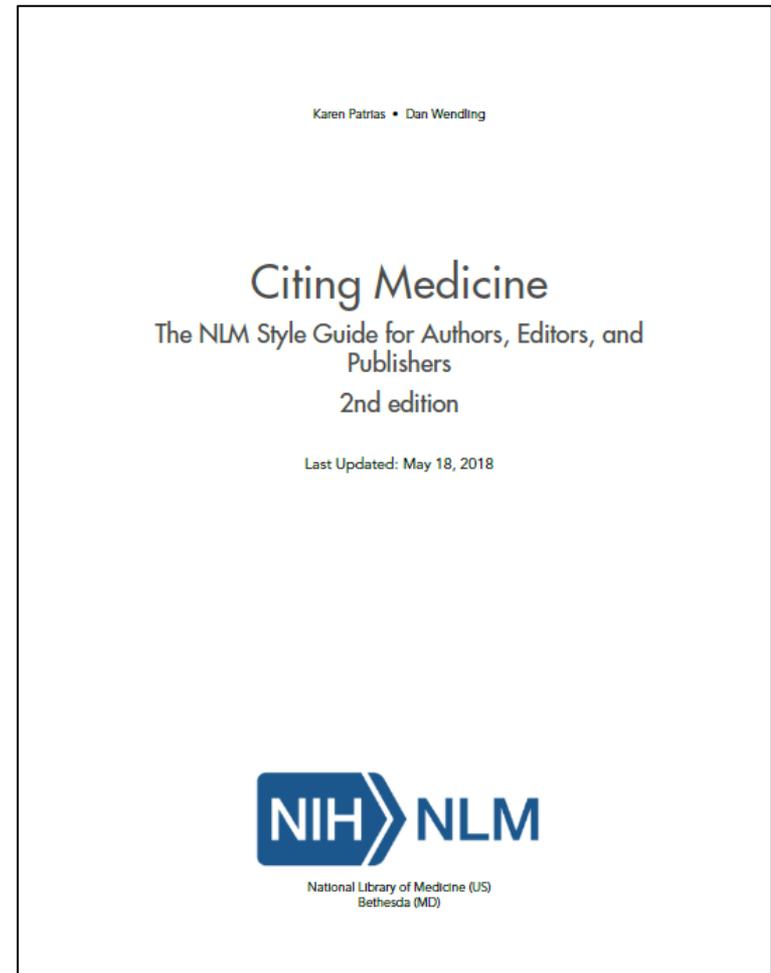| Harvard (cited by author-year) | Vancouver (cited sequentially) |
|---|---|
| In text: Last name of author + publication year | In text: A number |
| At end of manuscript: Listed alphabetically by authors' last names | At end of manuscript: Listed numerically in the order of appearance |
| Example:<br>• In text: The largest EVD epidemic occurred during 2014–2016 in West Africa (Allan, 2016).<br>• At end: Allan, Marc. Ebola outbreak in West Africa. Emerg Infect Dis. 2016 Sep | Example:<br>• In text: The largest EVD epidemic occurred during 2014–2016 in West Africa.[1]<br>• At end: 1. Allan, Marc. Ebola outbreak in West Africa. Emerg Infect Dis. 2016 Sep |
| Seldom used | Used by most journals |

# Your turn: which style is better?

- Harvard style
  - "Blake and Wallace reported that the measles vaccine was effective. (12)"

- Vancouver style
  - "The measles vaccine is effective. (12)"

# What source materials to cite?

| Valid sources | Undesirable sources |
| --- | --- |
| Recent articles from peer-reviewed scientific journals | Abstracts from conferences or conference proceedings |
| Articles accepted for publication ("in press") | Unpublished data |
| Reports from established organizations (ex: CDC, WHO, UNICEF) | Work not yet accepted for publication ("submitted," "in preparation") |
| Books | Personal communications |
| | PhD theses |
| | Textbooks |
| | Wikipedia and the Web in general |

# Reference slide: Formatting of references

- *Citing Medicine: The NLM Style Guide for Authors, Editors, and Publishers [Internet]. 2nd edition*
- Free download
- Consult the journal's *Instructions to authors*



Karen Patrias • Dan Wendling

## Citing Medicine
The NLM Style Guide for Authors, Editors, and Publishers
2nd edition

Last Updated: May 18, 2018

NIH NLM
National Library of Medicine (US)
Bethesda (MD)

**www.ncbi.nlm.nih.gov/books/NBK7256/**

# Levels of editing (comprehensive edit)

**1** — **SUBSTANTIVE EDITING** to improve the document
Ensure structure, content, language, style & presentation of document are suitable for audience

**2** — **COPY EDITING** for grammar, spelling, consistency
Ensure document is accurate, clear, & consistent

**3** — **PROOFREADING** for errors before publication
Ensure document is ready for dissemination

*Adapted from http://iped-editors.org/About_editing/Levels_of_editing.aspx*

# The editing process

# Types of editing: *The forest, the tree, the leaf*

**Substantive editing:** deals with content

- Overall soundness of arguments and thesis
- Impact
- Clarity
- Readability
- Style

**Copy editing:** deals with form, mechanics

- Grammar
- Vocabulary
- Spelling
- Punctuation
- Sentence structure
- Paragraph structure
- References

**Proofreading:** deals with quality control

"Songs are not written, they are rewritten."

*Johnny Mercer*

# 1. Substantive editing

- Focus: overall goal of the project
- Editor task: work with author to discuss document
- Questions to ask:

  - What is the purpose of the document (inform or persuade)?
  - Who is the audience (general public, scientist, policy maker)?
  - When is this due (how long do I have to work on this?)
  - What do you want reader to know (main message)?
  - What do the readers know/don't know about the topic?
  - How is the document meant to be read (in one sitting, in sections?)
  - Where is the document published (online, in journal)?

# What substantive editing involves

- Overall structure and style of document
  - Is the document complete (illustrations, references, index)?
  - Is the document organized logically?
  - Are rewrites needed?
  - Are the sections structured logically?
  - Is the language level appropriate for audience?
  - Is the flow logical?
- What is does NOT involve:
  - Not grammar or spelling
  - Not re-write of sentences

# 2. Copy editing

- Focus: correctness, consistency, and clarity
- Copy editor task: Take a text, and make it better
- Deals with
  - Grammar
  - Punctuation
  - Spelling
  - Capitalization
  - Syntax
  - Overall correctness and consistency

# Copy editing areas

**CORRECTNESS**
- Spelling and capitalization
- Grammar
- Punctuation
- Syntax

**CONSISTENCY**
- Distinctive treatment of text (i.e., italics)
- Abbreviations
- Numbers

**CORRECTNESS & CONSISTENCY**
- Lists
- Tables and figures
- Notes and bibliographies
- Internal consistency, including of fact

**CLARITY**

# 3. Proofreading

- Focus: Quality control
- Copy editor task: Take one final look to make sure the document is ready for publication
- Deals with:
  - Typos
  - Formatting issues
  - Design and layout
  - Errors missed in previous edits

# Proofreading components

- Check against previous copy
  - Are all edits done, amendments inserted, errors fixed?
- Check for completeness
  - Preliminary matter (cover, table of content, copyright, publication information)
  - Text (abstract, IMRAD sections, tables, graphs, references, index, appendices)
- Proofing
  - Spellcheck, typos, punctuation errors
- Format
  - Page numbers, headings, subheadings, widows, orphans, spacing, idents, logos
- Style
  - Does the language and the format follow the style guide?

# Proofreading tips

- Allow lots of time

- Use spellchecker

- Proofread printed document (not on computer)

- Read slowly in quiet area

- Proofread several times

- Give to another person to proofread too

# Proofreading: Type of errors

- Spelling
- Incorrect word division
- Punctuation
- Grammar and usage
- Styling inconsistencies
- Content (or fact) errors
- Dropped copy
- Garbled copy
- Transpositions
- The letter ell for the numeral one or vice versa
- Repeated letters, words, and symbols

- Incorrect placement of elements
- Incorrect numbers and dates
- Misplacement of art
- Word blocks and hyphen stacks
- Incorrect specifications
- Errors in type size
- Errors in spacing
- Wrong font
- Incorrect measure
- Letterspacing and excessive space between words and lines
- Errors in alignment of turnovers

# Editing and proofreading tools

- Two ways to edit manuscripts:
  - Electronically, using the track changes features in MS word
  - By hand, using standard proofreading symbols

| Marginal Mark | Textual Mark | Instruction |
|---|---|---|
| the/a | In first step, model | insert |
| ✗ | refer back to | delete |
| # | Genesplice | insert space |
| thin # | 300,000 | insert thin space |
| □ | This analysis | insert 1-em space |
| ◡ | EEG re cording | close up space |
| ◡̂ | innoculate | delete + close up |
| sp | npo for 8 h | spell out |
| a | seperate study | substitute |
| tr | mean rate error | transpose |
| ¶ | the RNA. We found | new paragraph |
| run in | The following five criteria | no paragraph |
| ⌐ | Use of anti-inflam-matory | break line |
| [ | to find the | move left |
| ] | to find the | move right |
| ⌐ | The drugs have | move up |
| ⌐ | The drugs have | move down |
| ] [ | Chapter Title | center |
| ‖ | P < .001  P < .05 | align vertically |
| caps | Medline | capitalize |
| lc | DNAse | lowercase |
| c + lc | journal article | capitalize + lowercase |
| sc | d-galactose | set small caps |

| Marginal Mark | Textual Mark | Instruction |
|---|---|---|
| ital | strains of E. coli | set italic |
| bf | Discussion | set boldface |
| lf | given 5 mg daily | set lightface |
| rom | we emphasize that | set roman |
| ∨ | $3.27 \times 10^9$ | set superscript |
| 2̂ | $2H_2 + O_2 = 2H_2O$ | insert subscript |
| wf | One participant had | wrong font |
| stet | and a double helix | stet (let it stand) |
| ⊙ | The study ended | insert period |
| ⌃ | Moreover the data | insert comma |
| ⊙̈ | on the following list | insert colon |
| ⌃ | in all cases however, | insert semicolon |
| ? | What is the dose | insert question mark |
| = | double blind study | insert hyphen |
| $\frac{1}{N}$ | pp 300 / 305 | set en dash |
| $\frac{1}{M}$ // | the lowest 1, 2, and 5 were added | set em dash |
| ⌃ | 15 years experience | insert apostrophe |
| ⌃/⌃ | said that the side effects were minimal | insert quotation marks |
| ⟊/⟊ | tuberculosis TB | insert parentheses |
| [ / ] | (in tuberculosis TB) | insert brackets |
| minus | $x^2 / y^2$ | set minus sign |
| equals | $x^2 - y^2 z^2$ | insert equals sign |
| prime | The 5 terminus | set prime sign |

*Source: www.biomedicaleditor.com/proofreading-marks.html*

# The style sheet/style guide/style manual

- **Definition:** Document detailing a set of writing, editing, and formatting standards of a publisher, publication, or organization

- **Goal:** Ensure all documents are uniform in style and format

- Topics covered:
  - Punctuation
  - Spelling
  - Word use

# Style guide topics
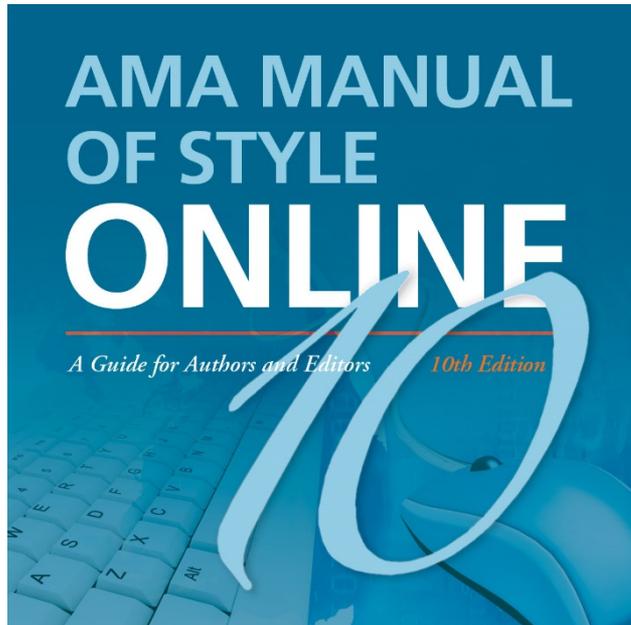
## General categories

- Punctuation
- Numbers
- Abbreviations
- Bibliographic style
- Distinctive treatment of words
- List style
- Table/graph/chart style
- Repeated headings/instructions
- Caption/legend style
- Cross-reference (callout) style
- Character names/people
- Locations/place names

## Alphabetical list

- Spelling variants
- Difficult-to-spell technical or *very* uncommon words
- Proper nouns (people, places, products, events, buildings, etc.)
- Foreign-language terms
- Compound words
- Slang, jargon, technical language
- Agreement issues (collective nouns, pronoun use to avoid bias, pronoun use for institutions, animals, etc.)
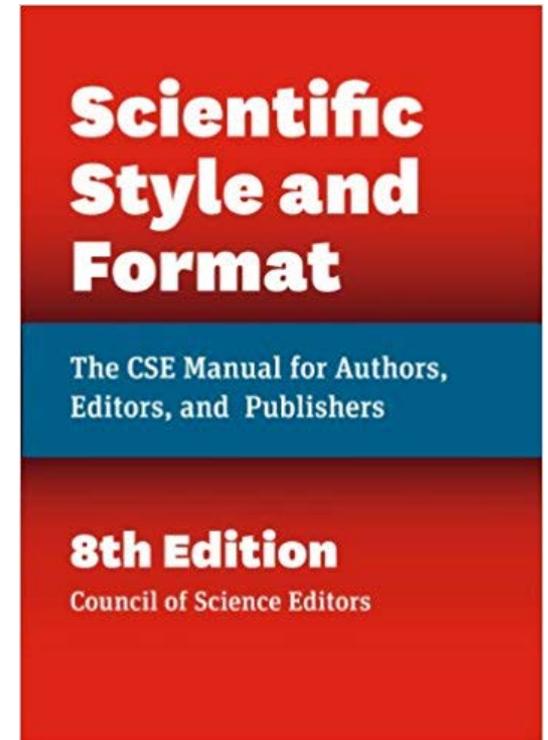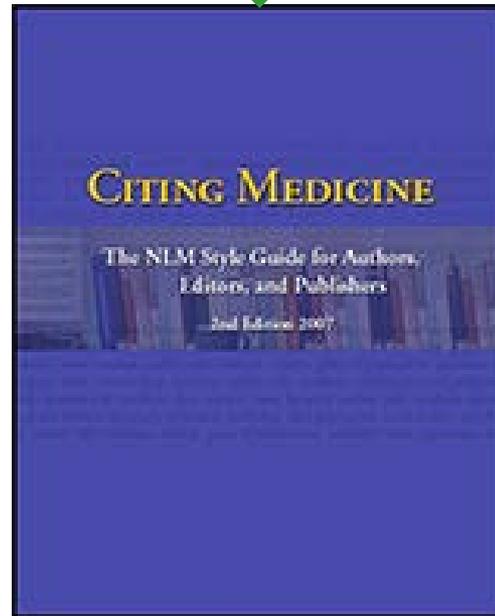
# Three science style manuals

www.amamanualofstyle.com/

https://tinyurl.com/yacwhwl7

**FREE!!!**

**AMA MANUAL OF STYLE ONLINE**

*A Guide for Authors and Editors* 10th Edition

**CITING MEDICINE**

The NLM Style Guide for Authors, Editors, and Publishers

2nd Edition 2007

**Scientific Style and Format**

The CSE Manual for Authors, Editors, and Publishers

**8th Edition**
Council of Science Editors

https://tinyurl.com/y7ha73xn

# Other style guides

- Uniform Requirements for Manuscripts Submitted to Biomedical Journals (www.nlm.nih.gov/bsd/uniform_requirements.html )

- The Chicago Manual of Style (online)

- ICMJE Recommendations (pdf )

- APA Style CENTRAL (online)
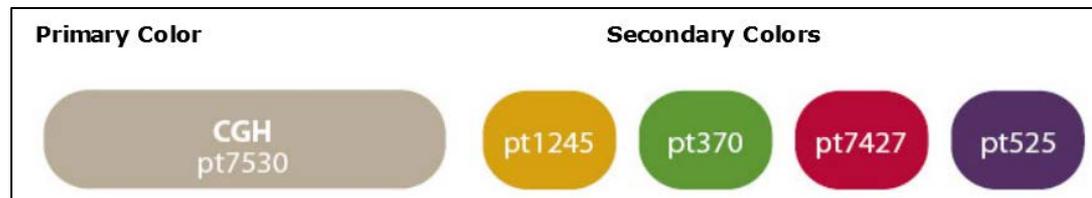
# The brand style guide

- **Definition:** Document detailing a set of visual rules for the organization
- **Goal:** Ensure all documents have the same look and feel
- Represents the identity of the organization
- Covers all material types (printed, web, PPTs, posters, business cards, etc…)
- Graphic elements covered:
  - Logos (color, size, location, rules for using)
  - Tagline, mission
  - Colors (departments color scheme, document titles, subtitles, etc
  - Fonts (what families)

**Serves as the visual DNA of the organization**

# Example: CGH standards

- CDC mission: To promote the health and quality of life by preventing and controlling disease, injury, and disability.

- CGH tagline: "For a Safer Healthier World"

- Color palette example for Global Health



**http://brandidentitystandards.cdc.gov/**