

Corrigo

Effective Onscreen Editing

Part one of a four-part series

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Introduction

Editing is moving increasingly off paper and onto the computer screen, and although the essence of the work remains the same, the details change greatly. Unfortunately, the problem with onscreen editing is that it's like walking: Once you've been doing it for a while, you do it so automatically that you can't remember the details well enough to explain them to someone else. Based on my own experience, supplemented by discussions on the copyediting-1 discussion list (see "Ask the Editor" on page 6 for instructions on how to join), I've prepared this article to help us remember how to teach onscreen editing to others — or acquire this skill ourselves. In addition to my own thoughts on this matter, I've incorporated and expanded upon comments by Linda Renshaw (managing editor of *South Carolina Wildlife Magazine*) during the course of one of these online discussions.

This article focuses on using a word processor to edit text, irrespective of whether that text eventually appears onscreen or in print. In terms of substantive editing, in which editors spend more time understanding a logic or content problem than they do fixing it, the similarities between onscreen and on-paper edits far outweigh the differences. Factual errors are equally wrong on paper and in your word processor, and unclear wording doesn't become clearer when you print it to do a hard-copy edit. Rather than exploring the differences between editing for onscreen and print media, I'll concentrate on the mechanics of marking corrections, inserting questions and suggestions, and communicating the results to the author.

Everyone who edits manuscripts onscreen develops a personal, sometimes idiosyncratic, manner of working, and that's as it should be — no one solution works best for everyone. Nonetheless, every editor encounters certain common problems, and some strategies seem to work better than others and are worth proposing to a new editor confronting the process for the first time. This series of articles will reflect what I consider to be efficient techniques for my own style of editing, but your approach will undoubtedly differ from mine (or diverge from mine as you become more experienced with using my approach). But the approach I outline below can serve as a good starting point for developing or refining your own approach.

Accuracy Versus Efficiency

Editors have engaged in an ongoing debate about whether onscreen editing can ever approach the accuracy of hard-copy editing. On the face of it, it appears obvious that paper should win hands down for several reasons:

See ONSCREEN, p.4

IN THIS ISSUE	
Effective Onscreen Editing	Cover
"Corrigo" Editor's Corner	2
SIG Managers' Column	3
Lighter Moments	6
Ask the Editor	6
Newsletter Guidelines	7
Forum 2000: A Conference for Technical Communicators Worldwide	8
USDA Certification Courses in Editing	8

“Corrigo” Editor’s Corner

The first thing I would like to do is thank the members of the newsletter team for helping make this newsletter a reality: copyeditors Fran Freiman and Julia Neunreiter, “Ask the Editor” host Geoff Hart, SIG managers Diane Feldman and Patricia Tierney, and the members who heard my plea and sent in articles.

If you sent in an article and it isn’t published yet, it is because I limited the size of this issue to eight pages. Depending on members’ comments, I may make adjustments where required. Some of the articles show potential for being great regular columns. I’ll be reviewing these articles again and contacting their authors to see if they would like to host these columns on a regular basis.

The newsletter’s name, “Corrigo”, is the Latin word meaning “to correct, to make correct, to make right”. Considering this is what editors do, I felt it to be an appropriate name for the newsletter. “Corrigo” will be published quarterly, and I’m hoping that we can make it an educational, informative source of information, which will help you deal with issues you face as an editor. However, to do this we need your help — we need members to send in their articles relating to their editing experiences and trials or tribulations. Some members feel that because they are new to the editing field, they do not have the knowledge to contribute — this is not so. We all can learn from each other no matter what the experience level.

Some of you have sent me emails that you have an article you are willing to write and want to know if I am interested. Yes, I am interested in any articles that might help other editors. Once it is ready, please e-mail it to john.jaillet@home.com and place ARTICLE in the subject line of the email. I will read these right away and get the articles off to the copyeditors. I can handle most formats that Word 2000 can read or an Acrobat .pdf. Please read “Newsletter Guidelines” on page 7 for more information.

Well, we have started the ball rolling, and now we need your help to keep it rolling. If half our membership submits one article each, we would have enough articles to publish the newsletter monthly for two years. Do you have yours ready yet?

John retired from the Canadian Airforce in 1994 and presently is the technical editor for Northern Airborne Technology Ltd., a manufacturer of specialized avionics equipment for rotary and fixed-wing aircraft. John can be reached via e-mail at john.jaillet@home.com.

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Managing Editor: John Jaillet
john.jaillet@home.com

Copyeditors: Fran Freiman
Julia Neunreiter

Ask The Editor Host: Geoff Hart
geoff-h@mtl.feric.ca

SIG Managers: Diane Feldman
diane.feldman@wwgsolutions.com

Patricia Tierney
prtierney@sprintmail.com

LETTERS TO THE EDITOR

Please e-mail comments, suggestions and opinions regarding “Corrigo” or the TE SIG to john.jaillet@home.com.

REPRINTS

Reprints of any of the original material herein are permissible with the proper attribution (source, including date of issue and name of author). A copy of the publication in which “Corrigo” material was reprinted must be sent to the managing editor at john.jaillet@home.com or 920 Dundee Road, Kelowna, B.C., Canada, V1X 1R5.


SUBMISSION

Articles and news items should be submitted to the editor two months prior to the month of March, June, September and December. E-mail files in a format Word 2000 can read or .pdf to john.jaillet@home.com. Please place ARTICLE in the subject line.

If you want to become a member of the TE SIG, you can contact the society office at:

901 N. Stuart St., Suite 904
Arlington, VA 22203-1854
(703) 522-4114
www.stc-va.org

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 society for technical communication

GUIDE, continued from p. 7

You are responsible for the accuracy of the quoted information in your article(s). When in doubt, let your sources review your completed article before submitting.

Including a source's name in your article, either with or without his or her employer's name, implies that you have received permission from your source to publish the article with information attributable to him or her.

Humor

We do appreciate a little humor in our lives and reading. However, the humor must be appropriate to the audience; vulgarity, off-color jokes, ethnic jokes, stereotyping and certain innuendoes should not be included in any submitted material.

Deadlines

Deadline dates for articles, unless otherwise arranged, are Jan. 1, April 1, July 1 and Oct. 1. In short: submit articles a minimum of two months before newsletter publication.

Articles sent and accepted for publication may be edited for clarity, style, and space.

Send your submissions for inclusion in the newsletter to: *john.jaillet@home.com*. In the subject line of your message, please write **ARTICLE**.

SIG Managers' Column

Welcome to the first issue of "Corrigo". Many thanks to John for his initiative and generous volunteerism in serving as editor. And thanks to Geoff for contributing a substantial article.

We hope this first issue will inspire you with more ideas for making "Corrigo" responsive to your interests and needs as technical editors ... and that you will share both your ideas and your writing.

Well over 1,000 STC members belong to the TE SIG. In organizational maturity, if not age, we are currently a young group; our achievements are before us! Via the newsletter, the egroup, and the STC Web site, we are now becoming able to act organizationally. We hope you, the members, are vocal about the best ways to determine worthy group objectives and pursue them. Let us know what you think about any of the following concerns:

- Should we conduct a member interest survey? (And who would like to design it, collect responses and evaluate decisions?)
- Should we make it a standard to publish the newsletter electronically (we do have about 150 members who cannot receive it electronically)?
- What editing resources should we identify and evaluate for members to refer to easily?
- What editing topics are most relevant to you?
- Who among us will attend the May 2001 annual conference, and what can we as an active SIG contribute educationally to it, it is not too early to work on this.

How do you want to contribute to your newsletter and to your SIG, and how can we help?

Diane Feldman
Patricia Tierney

ONSCREEN, continued from p. 1

- Laser-printed text has higher resolution and contrast than does onscreen text.
- Paper causes less eye fatigue than does a flickering monitor.
- Early studies have shown that editors missed fewer errors on paper than they did on a screen.

But the display quality of computer monitors has improved dramatically since those studies, and years of practice have helped us improve our onscreen editing skills. I haven't seen any recent studies on this subject, but anecdotal evidence (including the claims of several experienced editors whose opinions I respect greatly) suggests that the accuracy of editing onscreen can now approach or exceed that of hard-copy editing.

If you're at all uncertain about this, try editing a document onscreen, and then print the revised version for a second edit to see what you missed during the first pass. Many experienced editors prefer to do their second pass on paper, whereas others reverse the process and edit on paper first. This second pass doesn't really represent additional work, because you'll want to read through the document a second time no matter what medium you use for your editing. No professional editor I've met considers an edit to be complete after only a single pass, and most of us make multiple passes, looking for different things each time.

By identifying the types of problems you routinely miss when you're working onscreen, you can subsequently focus on these blind spots and improve future onscreen edits. In general, you'll discover that you catch certain things onscreen that you miss on paper and vice versa, and experience has taught me that onscreen editing versus hard-copy editing is rarely an either/or issue. If you have the luxury of looking at a document in two different media, you should take that opportunity for two reasons:

The more passes you make through a document, the more errors you'll catch. The change in perspective when looking at the same text in two different media increases the chance of catching errors, just as elapsed time between consecutive hard-copy edits lets you approach the task with fresh eyes. (Speaking of which, don't forget that changing media also gives your eyes a rest, something optometrists recommend strongly.)

Given that the accuracy of onscreen editing can match that of hard-copy editing, the next question becomes whether editing onscreen is efficient. To be truly efficient, the process must improve both your editing efficiency (speed and accuracy) and the author's ability to respond to your edits and produce the final, improved manuscript. Onscreen editing really shines here for several reasons:

Once you've typed your edits into a file, nobody has to retype them and proofread the retyping to detect errors; the corrections are already present in the file, and the author need only accept, reject or modify them. Many organizations no longer have typists to make corrections on behalf of authors, and where slow-typing authors would have to retype your corrections themselves, this benefit can itself justify onscreen editing.

If, like many technical communicators (me, for instance), you have illegible handwriting, typing your comments eliminates the time someone would otherwise waste trying to decipher your scrawled comments.

If you plan to do any significant amount of your editing onscreen, take some time to modify your working environment for optimum efficiency. For example:

- **Display Contrast.** I prefer a high-contrast display with black text on a white background, but other editors prefer color combinations that I consider bizarre; some justify their choice on the basis of reduced eyestrain or improved accuracy, whereas others simply like certain colors better.
- **Windows.** I prefer a single uncluttered window so I can see as much text as possible without scrolling; others prefer to have multiple windows open in a document.

See ONSCREEN, p 5

ONSCREEN, continued from p. 4

- **Font.** While I can edit reasonably well with a 12-point Times Roman font early in the day, I prefer using a larger sans serif font in the evening, once my eyes have grown fatigued.

Check your word processor's View menu to see what other options exist to make reading easier (e.g., the ability to zoom in on the manuscript).

Ideally, you should return the edited manuscript to the author in the same format as when you received it, but that doesn't stop you from temporarily formatting it the way you prefer. If the author defined and used paragraph styles, you can change the typeface and font size simply by redefining those styles to fit your preferred work style, then you can change them back to the author's settings once you're done. (If your software marks your changes as you edit, redefine the styles before you make these changes so the author will never notice that you've made them.) The principle is to pay close attention to how you work and to experiment with the software's settings until you find a combination of screen colors, typefaces and font sizes that works well for you.

File-Exchange Issues

When you and the author use the same software, exchanging files poses fewer problems than it does when you're using different programs, though there are often small glitches you need to watch for (e.g., if your client uses a foreign-language version of your

word processor or a different operating system, the character sets probably won't match perfectly). Exchanging files between the Macintosh and Windows platforms is notorious in this regard, because the upper portion of the two character sets (i.e., the characters that aren't printed on your keyboard) differs between these two platforms. Worse yet, you sometimes find yourself having to edit files created in software you don't own. In all these cases, exchanging files with an author requires some form of file conversion, whether using the software's Save As or Export feature or special translation software.

Transfers within an organization typically pose the fewest problems, because most large organizations standardize and debug the file formats and transfer mechanisms. But you won't always have the luxury of using fully compatible software, which means you'll have to face the problem of conversions. Whenever you must convert between file formats, allow some time for testing so you can ensure that the conversion process preserves your revisions and comments. If you and the author are using different software, pay particularly close attention to how successfully insertions, deletions and comments survive the conversion. Testing will reveal what problems you can expect, and that gives you a chance to develop solutions before you exchange files with the author.

Transferring files to distant clients over the Internet cre-

ates additional problems. File-size limitations are the most common problem, but they generally represent an inconvenience (e.g., slow transfer times) rather than an actual barrier to file exchange. Compressing files using such software as WinZip on PCs and StuffIt on Macintosh is a great help, and it has the additional bonus that compressed files usually contain error-recovery information that will help them survive the rough trip through cyberspace. Keep in mind that some organizations and Internet service providers impose limits on file sizes in an effort to reduce their e-mail costs (by reducing transfer times). If you're working on large projects, these automatic limits may exclude even compressed files, and you should ask the organization or Internet service provider to make a temporary or permanent exception in your case to permit large file exchanges. If this doesn't work, you can ask the Internet service provider to set up an FTP (file transfer protocol) directory to exchange files, because FTP software isn't affected by limits set on e-mail. When neither of these options exists, you may have to resort to breaking the file into several smaller files or even sending it on floppy disks or other media.

Until recently, the protocols that different computers used to transfer files posed an obstacle, but this issue has become less important. Internet standards, such as the MIME extension to the Internet's original e-mail protocol, See *ONSCREEN, p. 6*

ONSCREEN, continued from p. 5

now help ensure successful file transfers between almost any two computers. With few exceptions, most Internet service providers can now handle these standards, but even that's not guaranteed. So depending on how modern your client's setup is, some experimentation may be required before you find a combination of file format and transfer protocol that lets you exchange files correctly.

Acknowledgments

I'd like to thank Andrea Balinson, Shoshanna Green, Jane Lyle and Linda Renshaw for their comments on an earlier version of this manuscript.

Resources

The "Technical Editor's Eyrie" Web site (www.wrevenge.com.au/index.htm) is a useful resource run by Jean Weber. You can also get her book "Electronic Editing: Editing in the Computer Age" (www.wrevenge.com.au/bookshop/e-edit.htm) by downloading a .pdf version or ordering a printed copy. The book discusses onscreen editing in far more detail than I can do here.

Part two of this four-part series will be featured in the next issue of the newsletter.

Lighter Moments

The Blessed Helper, the Spell Chequer

Author Unknown

Eye halve a spelling chequer
It came with my pea sea
It plainly marques four my revue
Miss steaks eye kin knot sea.

Eye strike a key and type a word
And weight four it two say
Weather eye am wrong oar write
It shows me strait a weigh.

As soon as a mist ache is maid
It nose bee fore two long
And eye can put the error rite
Its rarely ever wrong.

Eye have run this poem threw it
I am shore your pleased two no
Its letter perfect in it's weigh
My chequer tolled me sew.

Ask the Editor – With Host Geoff Hart

In close to 15 years of editing for a living, it's grown increasingly obvious to me that no one editor knows it all. Thus I've begun this column as a forum for answering quick, general-interest questions from working editors. Send any short query that you'd like to appear in the newsletter to my work e-mail address geoff-h@mtl.feric.ca with the subject line "Ask the Editor."

This is not an ongoing offer to solve individual editing problems; the answer to our first question below provides a resource that meets this need faster. If I can't answer your question myself, I'll research the problem with the help of several learned colleagues, and if you've got us all stumped, I'll throw the question open to our fellow members of the TE SIG and to the copyediting-l discussion group. If you don't request that I include your name and contact information (so readers can respond directly), I'll attribute the question to that most prolific of authors, Anonymous. To start the red ink flowing:

Q: How do I join the copyediting-l discussion group?

A: Follow these instructions:

To the following address:
Listserv@listserv.indiana.edu

Send the message:
subscribe copyediting-l firstname lastname

Note: Replace "firstname lastname" with your real name.

Turn off your software's signature function, and leave the subject line blank.

Newsletter Guidelines

Articles, tutorials, reviews, etc., should be geared toward helping editors become more informed, proficient and effective in his or her editing tasks.

Guest columns, which can be more creative and informal, could discuss something like “been there, done that, and here is what has (or has not) worked for us.”

Featured Articles

Topics should provide methods, solutions or guidelines that are practical for technical editors. Basically, if it’s interesting to you, it will likely be interesting to others. Articles can be 700 to 2,800 words.

Columns

Columns can vary in length depending upon the material.

“Bag o’ Tricks” will feature Web sites, books, journals, articles, tips and tricks, seminars, distance learning programs, methods of works and any other tidbits that editors have found invaluable for their own work.

Verify URLs to Web sites and other online resources. References to books should list the author’s name, title, publisher, date, and (if possible) ISBN.

“Guest Commentary” is a forum for expressing your views on our profession. Topics are not limited, and the TE SIG members are encouraged to send their opinion pieces to “Corrigo” managing editor. “Guest Commentary”

columns can be 500 to 1,500 words.

“Problem Solved” lets technical editors elaborate on their experiences. You can discuss any problem or issue you faced and how you solved it either alone or with your co-workers. “Problem Solved” columns can be 500 to 1,500 words.

Reprinted Content

In some circumstances, the TE SIG will reprint articles from other publications. Because it is impossible for the TE SIG newsletter staff to read all the publications that may bear some relevance to technical editors, we welcome any suggestions from TE SIG members.

Suggestions for reprinted content may be forwarded to the “Corrigo” managing editor. If the material is available online, please send at least a verified URL. Copies of downloaded .pdf files, HTML pages or scanned pages are always welcomed.

Where reprinted content is available online, the TE SIG newsletter staff will assume responsibility for obtaining reprint authorization from the original publishers.

If reprinted content is coming from a printed source, the newsletter staff requests that TE SIG members obtain written permission from the publication’s editor before submitting the material to us.

Text Format

We prefer to receive articles in any format readable by Word 2000.

Bylines

Writer’s bylines should be exactly as you would like to see them in print. If you would like to include your company’s name as part of your byline, that is acceptable. Including your employer’s name in your byline implies that you have received approval from your manager(s) to publish the article as submitted.

Sending Multiple Files

When sending multiple files, such as documents and graphics, please compress them into .zip files. Do not send them as self-extracting executable (.exe) files.

Citing Other Sources

The TE SIG newsletter staff has no objections to TE SIG members citing the work of other writers in their own articles. The citations cannot be more than one-quarter of the article’s length, and the article should state the author’s name, publication/book name, article title, page number and date of publication.

In some articles, you may have a source that is willing to be interviewed. The TE SIG newsletter staff welcomes and encourages the use of interviews and quoted sources wherever possible and/or appropriate.

See GUIDE, p. 3

Forum 2000: A Conference for Technical Communicators Worldwide

Forum 2000, which will be held in London June 12-14, 2000, is inviting technical communicators around the world to participate in a multifaceted discussion of the role of the technical communication profession. Held at the Commonwealth Institute in London, Forum 2000 is being organized by:

- The Institute of Scientific and Technical Communicators (ISTC), United Kingdom
- The Society for Technical Communication
- The IEEE Professional Communication Society
- tekomp (Germany)

This conference will give technical communicators and those in related professions the opportunity to make new contacts with people who share their interests and experiences and to meet participants with different backgrounds and viewpoints. Forum 2000 will provide a friendly environment in which participants can listen, learn, and exchange ideas and opinions with colleagues from more than 25 countries.

By taking part in the idea market, the sort-and-build groups, the brainstorming, the information and debate sessions, the networking lunches, and videoconferencing with other groups, participants can improve their knowledge about how other technical communicators achieve success in a variety of industrial, commercial and academic environments and applications.

For more information and the preliminary program, go to the ISTC Web site (www.istc.org.uk/) and click on **FORUM 2000**.

USDA Certification Courses in Editing

The U.S. Department of Agriculture (USDA) offers various distance learning courses in editing. The URL to the Editing Curriculum page is http://grad.usda.gov/programs_services/corres/edit_index.cfm.

The courses are:

- EDIT1140-C -- Introduction to the Editing Process
- EDIT1160-C -- Proofreading
- EDIT2230-C -- Intermediate Editing
- EDIT3350-C -- Technical Editing
- EDIT3360-C -- Basic Indexing
- EDIT3361-C -- Applied Indexing

The courses are designed for distance learning and are reasonably priced from U.S. \$272 to U.S. \$398.

—*Diane Searer*