

Professional Editorial Standards 2024

Knowledge, skills and practices most commonly required for editing English-language material

The Fundamentals of Editing

Structural Editing

Stylistic Editing

Copy Editing

Proofreading



EDITORS CANADA



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Professional Editorial Standards 2024



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Introduction

What is editing?

Editing involves carefully reviewing, correcting and improving material and suggesting changes to help optimize the content, language, style and design for its audience, medium and purpose.

The editor must skilfully and tactfully balance the interests of the client or the owner of the material and, ultimately, the interests of the intended audience.

The editor can also be part of a team that guides a work from a first version to the end product and must therefore collaborate effectively with all team members.

What are professional editorial Standards?

The 2009 version of Professional Editorial Standards (PES) defined the Standards as “the knowledge, skills, and practices most commonly required for editing English-language material.” The Standards are statements about levels of performance that editors are expected to demonstrate. They clarify what is expected of Canadian editors and define the criteria against which their knowledge, skills and practice can be measured. Editors who meet these Standards are able to do a professional job with minimal supervision.

Why have professional Standards?

Several groups use the Standards.

Editors use the Standards to do the following:

- better understand the skills and knowledge they are expected to demonstrate
- support their own continuing education and professional development
- explain what editing is and what editors do
- define best practices for doing their work

Employers use the Standards to do the following:

- know what to expect from the editors they hire
- develop job descriptions
- create performance evaluation tools

Clients use the Standards to do the following:

- know what to expect from the editors they hire
- understand and negotiate editors' services

Educators use the Standards to do the following:

- develop training courses and programs for editing

Editors Canada uses the Standards to do the following:

- develop material for professional certification
- explain what editors should do when performing various stages of editing
- increase awareness of the value of editing
- provide products and services to editors throughout their careers
- offer publications, webinars and presentations on editing
- support and advance excellence in editing and the interests of editors

Does PES cover the entire content creation process?

No. PES covers the four stages of editing that begin when the content appears in its first iteration at structural editing and ends in its last iteration at proofreading:

- structural editing
- stylistic editing
- copy editing
- proofreading

Part A covers the fundamentals of editing, which all professional editors are expected to understand and demonstrate, no matter which stages they work on. Parts B through E cover the knowledge, skills and practices required at each stage. The Standards do not cover related work, such as rewriting, indexing and localization. These are described briefly in the Appendix.

Does PES describe all types of editing?

No. Editors work on many subjects and types of materials that require specialized knowledge and skills. For example, fiction editors must understand character development and story arcs, editors of speeches must be sensitive to rhythm and attention span, and website editors need to be familiar with search engine optimization (SEO) algorithms.

Certain editing jobs often require familiarity with more than one of the Standards at different stages of editing. Plain language editing, for example, might include a mix of structural editing (improving organization and content) and stylistic editing (clarifying meaning). PES does not try to capture all standards that all editors follow all the time. Instead, it captures the core Standards – those most commonly required.

Does PES focus on traditional print material?

No. PES covers the core Standards that all Canadian editors follow, regardless of the type of material they work on or how they edit.

Does every editor use the same terminology?

No. In our quickly evolving field, people who edit use a broad range of terms to describe what they do, the material they work on and who creates that material.

Error correction rates

Errors can occur at each stage of editing. There is no standard for acceptable error rates in editing. An error correction rate is the percentage of errors in a document that the editor has caught. Acceptable error correction rates have been proposed but have not yet been supported by research.

No editor's work is perfect, and perfection should be the goal but should never be the expectation, for the editor or for the material. Effective editorial processes function to minimize the percentage of errors missed in the process as a whole by having multiple editorial reviews, preferably conducted by different editors (because editors are less likely to catch their own errors than those of other people). Each editor checks the work of previous editors while performing their own editorial functions.

Productivity rates

Editors work at varying productivity rates. Those rates do not reflect how professional the editor's work is. Productivity rates are affected by so many variables that they are effectively meaningless. Those variables include the nature of the document, the editorial budget, the amount of time available to do the editing, the tools used for editing, the stage of editing and specific tasks requested, the work that has already been done and the quality of the work.

Most editors are aware of their productivity rates for standard tasks (such as a generic copy edit or proofread). That information is useful in estimating how long it will take that editor to do a specific task, but it is not related to their skill or professionalism.

A. The Fundamentals of Editing

Professional editors perform a variety of tasks, from managing an entire editing process to performing only a specific part of it. Regardless of the extent of their involvement, all editors need to broadly understand the various editing, production and distribution processes and the editor's role within them.

The Fundamentals of Editing specify the knowledge, skills and practices a professional editor must use to complete the work.

Before undertaking a project or task, editors should ensure that they have the skills, training and experience necessary to complete the work. There are also general skills that are not specific to a project, such as how to communicate effectively with everyone involved in the editing project or task.

A1 Editorial teams

If you are working with other editors, you are expected to do the following:

- A1.1** Effectively manage and resolve disagreements in editorial judgment.
- A1.2** Understand the collaborative nature of editorial work and receive the input and editorial judgment of everyone on the team graciously.
- A1.3** Be careful not to undo the work of the editors who came before you in the process and do not do the work of those who come later.
- A1.4** Support your own choices when asked (for example, refer to style guides, project goals, best practices, user feedback, current references).

A2 Editorial intervention and scope

As an editor, you must be aware of the scope of the project, the budget available, the level of edit required, the time available and other scheduling constraints. Ask questions if these details are not clear. Sometimes the level of edit requested is not the level of edit required. Negotiate and clarify the scope before starting work.

- A2.1** Understand how editing is influenced by the scope of a project: what the project is (its audience, medium and purpose); the level of editorial intervention requested or required; the time, budget and other resources available; the roles and responsibilities of the key players in the project; and the lines of authority.
- A2.2** Set and maintain realistic schedules and meet deadlines.
- A2.3** Recognize what needs to be changed and edited according to established editing conventions and style, as well as any organizational editorial practices and standards (e.g., a house style guide). Make or suggest changes to satisfy plain language practices and conscious language conventions as required.
- A2.4** Consider the implications of time, cost, production processes and the intended audience, medium and purpose when suggesting changes. At the earliest opportunity, flag problems that may affect the schedule or budget.
- A2.5** Make all changes while staying within the scope of the project and the stage of editing, and working to maintain a consistent voice, tone and register without altering the intended meaning.
- A2.6** Where applicable and feasible, flag elements of language and style that may be considered harmful or offensive to specific segments of the intended audience and suggest alternatives.

A3 Editorial stages

As an editor, you are expected to know your responsibilities at each stage of editing.

A3.1 Know the core roles within the editorial process:

- a. **Managing editor:** This role can vary greatly from one project to another. The managing editor plans and manages the development of the project. Bearing in mind the scope of the project, they assess the quality of the material and determine the editorial intervention that is appropriate. They determine the extent of the edit to be applied. This role can also be called acquisitions editor, developmental editor or project editor.
- b. **Structural editor:** Structural editing is assessing and shaping the overall organization and content of the material to optimize it for the intended audience, medium and purpose.
- c. **Stylistic editor:** Stylistic editing clarifies meaning, ensures coherence and flow at the paragraph and sentence level and refines the language.
- d. **Copy editor:** Copy editing corrects spelling, usage, grammar, and punctuation, and maintains consistency within the text.
- e. **Proofreader:** Proofreading checks all elements of the content and formatting for correctness, completeness and adherence to the style guide.

A3.2 Know that the editorial stages as defined in these Standards can often do the following:

- a. Overlap or unfold differently (e.g., proofreading only, combined structural and stylistic editing).
- b. Be described and understood differently (e.g., content editing, line editing).
- c. Include other types of editing not described in these Standards (e.g., beta reading, triage editing, peer review).

- A3.3** Verify that all necessary edits have been applied at each preceding stage and that new problems have not been introduced.

A4 Working with design and production

Be aware of your role in content creation, editing, design and production processes. Be aware of the basic principles, practices, conventions, terminology and tools used to accomplish each task.

- A4.1** Understand how design can be used to convey meaning and improve readability and accessibility in print and other media.
- A4.2** Understand how textual elements and the interrelationship between text, design and format can affect readability and accessibility in print and other media.
- A4.3** Understand the conventions for displaying tables, figures, graphs, maps and other visual elements that convey meaning.
- A4.4** Understand common visual elements and types of audio-visual media.
- A4.5** Understand and flag issues related to typography and formatting, such as typographical measures (e.g., pixels, points), text alignment (e.g., indentation, justification), spacing (e.g., letter and line spacing) and typeface (e.g., serif, x-height).
- A4.6** As the task requires, understand and use proofreader's marks on paper.
- A4.7** As the task requires, know the software used for design, formatting, electronic publishing and online content creation.

A5 Editorial processes

Understand current editorial processes and how they fit within larger production processes.

- A5.1** Be prepared to work in alternative workflows.
- A5.2** Understand the requirements of each task and project.
- A5.3** Understand and use the terminology employed in editorial and production work.
- A5.4** Know the essential requirements and conventions of different types of material (e.g., books, apps, periodicals, websites, reports).
- A5.5** Take initiative in collaborative editorial processes. Always flag potential issues as you see them.
- A5.6** Be flexible in collaborative editorial processes (e.g., defer to subject matter experts on content, allow for legal review).
- A5.7** Know how to use editing tools for electronic markup and how to use editing functions in word-processing programs.
- A5.8** Maintain appropriate document control and versioning to ensure the correct document and version are being marked up and submitted. If required, keep copies of successive versions, identify who has made the changes and take steps to ensure that all parties are using the current version of a document. Ensure that material approved in preceding stages has not been changed unintentionally.

A6 Audience considerations

Be aware of the audience's needs and how they will affect the editing and production choices. At every stage, look ahead to the final product.

- A6.1** Consider the needs and accessibility requirements of the audience, optimizing language, presentation and readability.

- A6.2** Know how to structure the material so that the audience can easily access the information they need (e.g., use clear and short headings, present information in chronological order, build on information previously learned), ensuring the organization of the information is clear to the intended audience (e.g., the information most relevant to the audience is easily accessible).
- A6.3** If the audience for your document will find the content difficult to read or unfamiliar, apply plain language principles.

A7 Legal considerations

- A7.1** Understand the legal dimensions of editing, and identify and either resolve or flag possible legal issues (e.g., copyright infringement, plagiarism, defamation, obscenity, privacy violations). Know when to suggest seeking legal counsel.
- A7.2** Know the basics of copyright legislation and how it affects all content producers. Look up specific provisions if necessary.
- A7.3** Know when permission is required (e.g., to reproduce an image or copyrighted text) and when consent is required (e.g., to use a person's name or image).
- A7.4** Know how to properly cite material.

A8 Ethical responsibilities

- A8.1** Edit to ensure the content is not misleading, false or otherwise lacking in integrity.
- A8.2** Understand the ethical dimensions of editing (e.g., the need to address biased, non-inclusive and offensive material; the need to respect confidentiality and privacy).
- A8.3** Avoid conflicts of interest by not using your relationships with any of your professional associates to profit financially or professionally without explicit approval.

A9 Conscious language

- A9.1 Know the history and evolution of the language being used. The use of certain terms and phrases may be inadvertently harmful.
- A9.2 Know who is excluded from the material because of factors such as age, sex, disability, race, ethnicity, religion, migration status, socioeconomic status, place of residence, sexual orientation, gender identity and gender expression.
- A9.3 Identify and either remove, amend, flag or document potentially biased, non-inclusive and offensive material (e.g., culturally stereotyped assumptions or content).

A10 Accessibility

- A10.1 Ensure the intended readers can understand the language in the document.
- A10.2 Be aware of any government or industry accessibility requirements for the kind of document you are working on.
- A10.3 Know how to check that the document the audience will see is accessible (note that making it accessible is outside of your scope as an editor).
- A10.4 Know the accessibility limitations of the software that is being used to prepare the document (e.g., the capability of built-in software to closed-caption video presentations).
- A10.5 Be familiar with accessibility-related resources, such as the latest *Web Content Accessibility Guidelines* (WCAG) for online content.
- A10.6 Understand how to compose and edit alt text – a short written description of visual elements like illustrations and tables. As the task requires, rework the alt text to make multimedia and other non-textual elements more accessible to people who use screen readers or Braille devices.

A11 Editing resources for spelling, usage, grammar and fact checking

As an editor, you should be aware of the various issues and options for language usage and know the available editorial resources and how to use them. Editing resources include dictionaries, manuals, databases, software applications, style guides and other reference materials that are often used in the trade. This list is not exhaustive, but it is intended to give you an understanding of what resources are commonly used to complete editorial work.

- A11.1** Use common editing resources, including software and reference materials relevant to editing, competently and efficiently.
- A11.2** Use current technology, software and systems for working with and sharing materials with authors, clients and team members.
- A11.3** Maintain competency in software and software features relevant to editing (e.g., finding and replacing items, marking revisions and checking consistency).
- A11.4** Know how to create and maintain a style sheet, and how and when it is used.

A12 Communication

Communication with your team members in the production and editorial processes is critical to achieving the intended result. It includes written and verbal communication of editorial feedback, such as markups, queries and memos, and discussing, justifying and negotiating changes.

- A12.1** When working on screen, use an agreed-on system for tracking and showing edits (e.g., Track Changes, PDF markup tools). When working on paper, use standard proofreading marks unless another system has been agreed on.
- A12.2** Use judgment about when to query and when to resolve problems without consultation. Do as much work as you can to minimize queries to reviewers.

A12.3 When writing queries, memos and author letters, ensure they are clear, tactful, succinct and actionable. If applicable, offer your best solutions.

A12.4 Clearly and diplomatically, request clarification of meaning and intent, explain changes as appropriate and propose or negotiate significant editorial changes.

A13 Not introducing errors

As an editor, you are expected to have a strong knowledge of grammar, spelling, punctuation and usage.

A13.1 Make all changes without altering the intended meaning or introducing errors, such as errors in fact, style or formatting.

A14 Ongoing professional development

As a professional editor, you should practise continual learning and ongoing professional development.

A14.1 Expand your knowledge and skills through continual learning (e.g., reading, taking courses, volunteering, attending webinars and conferences, listening to podcasts, participating in online groups and discussions).

B. Standards for Structural Editing

Structural editing is assessing and shaping the overall organization and content of the material to optimize it for the intended audience, medium and purpose.

Structural editing is also known as substantive editing. Structural editing (possibly with stylistic editing) is sometimes called manuscript editing or content editing.

A professional structural editor meets the Standards in Part A: The Fundamentals of Editing and meets the following Standards.

B1 Organization

- B1.1** Reorganize material to achieve a coherent structure and sequence, a logical progression of ideas and a narrative or expository flow, and a shape appropriate to the audience, medium and purpose. Keep in mind that the medium often determines organization (e.g., the inverted pyramid structure of a news story, the chapter arrangement of a book, the navigational structure of a website). If necessary and possible, create a new outline or site map and follow it or recommend it be followed.
- B1.2** Recommend headings and navigation aids to clarify or highlight the organization of the material.
- B1.3** Recommend the most effective positioning of ancillary textual material (e.g., sidebars, pull quotes, appendices, notes).
- B1.4** Indicate the most effective positioning of all visual elements.
- B1.5** Revise, cut or expand text, or suggest changes to meet length requirements.

B2 Content

The following Standards are related to content issues. Structural editors should follow them where relevant.

- B2.1** Determine what content is suitable and optimal given the audience, medium and purpose. Identify and either recommend or make appropriate deletions (e.g., to remove repetitive, irrelevant or otherwise superfluous text or other elements) and additions (e.g., to fill gaps in content or strengthen transitions between sections) in both text and visual elements to make the entirety of the material suitable and optimal.
- B2.2** Recognize and either query or resolve instances of questionable accuracy (e.g., anachronisms in fiction), inadequate research, imbalanced content and lack of focus.
- B2.3** Recognize and recast text that would be better presented in another form (e.g., number-laden text as a table, text as a diagram or infographic, a long run-in series of points as a vertical list, a lengthy digression as an appendix).
- B2.4** Select, create or secure appropriate visual elements (e.g., images, video, figures) in keeping with the requirements and constraints of the material (e.g., budget, schedule, format, medium). Determine the appropriate content of captions and titles.
- B2.5** Identify, create or suggest appropriate supplementary and reference material (e.g., glossaries, endnotes, links).
- B2.6** Prepare or secure accurate and complete supplemental material (e.g., audio and video, pop-ups, mastheads, front and back matter).
- B2.7** Determine whether any permissions are necessary (e.g., for quotations, visual elements, audio). Flag these copyright and permissions issues or bring the matter to the attention of the appropriate person; document all related efforts.

- B2.8** Detect and flag any suspected occurrences of plagiarism. Discuss your concerns with the most appropriate party. If not rectified at this stage, escalate if possible, and document all related efforts.

B3 Structural editing in plain language

- B3.1** When applying plain language principles in structural editing, do the following:
- a. Ensure that the document has the content that the readers need.
 - b. Check that the content of the document is structured so that related information is together and ordered in a way that makes sense for the readers.
 - c. Guide the readers to find information easily through such navigational aids as headings and heading levels, a table of contents, and bulleted or numbered lists.
 - d. Make sure readers can locate, understand and act on information.
 - e. Consider when to use illustrations or media other than text.

C. Standards for Stylistic Editing

Stylistic editing is editing to clarify meaning, ensure coherence and flow at the paragraph and sentence level, and refine the language. Stylistic editing is often done as part of a structural edit or copy edit rather than as a separate step. Editors should verify expectations before beginning a project or task.

Stylistic editing is also known as language editing. Line editing is often understood to be a combination of stylistic editing and copy editing.

A professional stylistic editor meets the Standards in Part A: The Fundamentals of Editing and meets the following Standards.

C1 Clarity

In improving a sentence, paragraph or passage, change only what is required. As appropriate, do the following:

- C1.1** Improve paragraph construction to convey meaning more effectively (e.g., adjust paragraph length for the audience and medium, establish clear topic sentences).
- C1.2** Improve sentence construction to convey meaning more effectively (e.g., use subordinate structures for subordinate ideas, gauge which situations would benefit from active voice or passive voice, make nonparallel constructions parallel).
- C1.3** Refine wording to convey meaning more effectively (e.g., replace noun strings, nominalizations and inappropriate euphemisms).
- C1.4** Resolve ambiguity (e.g., misplaced modifiers).

- C1.5** Revise sentences, paragraphs and passages to ensure logical connections.
- C1.6** Ensure all supplementary text (e.g., captions, footnotes, annotations, endnotes, prefaces) is clear and effectively conveys the intended meaning.
- C1.7** Verify that all visual elements (e.g., illustrations, tables, infographics) are clear and effectively convey the intended meaning.
- C1.8** Ensure audio and visual components are appropriate given the context.
- C1.9** Verify that titles, headings and subheadings are effectively positioned and presented for the audience. Check for any other needs, such as search engine optimization.

C2 Coherence and flow

- C2.1** Ensure that transitions between sentences and between paragraphs are smooth and effective.
- C2.2** Where necessary, reorder elements to ensure coherence and parallelism (e.g., sentences in a paragraph, bullet points in a list).

C3 Language

- C3.1** Ensure that the voice, style, point of view, tone and register are presented consistently and in keeping with the content and the author's goals and intentions.
- C3.2** Eliminate wordiness (e.g., by deleting redundancies, empty phrases, unnecessary modifiers) in the interest of clarity.
- C3.3** Improve language (e.g., eliminate clichés, replace negative constructions with affirmative ones).

C4 Conscious language

- C4.1** Where appropriate, point out words and phrasing that can be considered harmful, either intentionally or unintentionally, and suggest alternatives.
- C4.2** Understand the author's intentions when editing language so that it does not inadvertently offend intended readers. Consider whether the language might be harmful to unintended audiences that it will likely reach.

C5 Stylistic editing of narratives

Editing narratives requires a specific approach to stylistic editing, but the following Standards apply to almost any type of fiction or nonfiction narrative.

- C5.1** Help make the text more engaging and entertaining, and ensure there are no boring passages.
- C5.2.** Check that the text achieves the intended effect on the audience (e.g., try to ensure that the humour is funny, the erotica is arousing, the frightening passages are spine-chilling). Be aware of the cultural differences that can make it difficult to target this kind of editing for specific audiences.
- C5.3** Check that the mood of the writing matches the mood of the content (e.g., a funeral scene shouldn't usually be written flippantly).
- C5.4** Check that the mechanics of the writing match the content (e.g., a calm description of recumbent sheep in a field can be written in long sentences and paragraphs, but an exciting fight scene should move quickly by using short sentences and paragraphs and common words).

C6 Stylistic editing in plain language

- C6.1** When applying plain language principles in stylistic editing, do the following:
- a. As much as possible, use the intended readers' vocabulary.
 - b. Prefer concrete terms to abstract terms (e.g., *frog* instead of *amphibian*).
 - c. Use only the same words for the same meaning, and different words for different meanings.
 - d. Use language that is culturally relevant for the readers.
 - e. Address ambiguity.

D. Standards for Copy Editing

Copy editing is reviewing material to ensure correct and consistent grammar, punctuation, spelling and usage. It often includes checking that the required elements of the content are accurate and complete.

A professional copy editor meets the Standards in Part A: The Fundamentals of Editing and meets the following Standards.

D1 Correctness

- D1.1** Correct errors in grammar (e.g., lack of subject–verb agreement, incorrect pronoun case).
- D1.2** Correct errors in punctuation (e.g., comma splices, misplaced colons, incorrect apostrophes). Know when exceptions can be made (e.g., in fiction or advertising copy).
- D1.3** Correct errors in spelling (e.g., typographical errors, errors arising from homonyms).
- D1.4** Correct errors in usage (e.g., words commonly confused, such as *imply/infer*; incorrect idioms and phrases, such as *doggy-dog world* for *dog-eat-dog world*).
- D1.5** Where appropriate, point out words and phrasing that can be considered harmful, disrespectful or difficult to understand, keeping in mind conscious language and plain language principles.

D2 Consistency

- D2.1** Develop a style sheet, or follow one that is provided, to track, identify and consistently apply editorial style (e.g., abbreviations; treatment of numbers; vernacular usages; Canadian, British or American spelling).
- D2.2** Ensure the correct method of documenting sources is applied (e.g., reference list, footnotes, links). Consistently apply an editorial style for sources (e.g., MLA, Chicago) appropriate to the material or as directed.
- D2.3** Resolve variations in terminology, logic and mechanics (e.g., spelling, numbers, abbreviations).
- D2.4** Ensure all tables, visual elements and multimedia match the surrounding text and are consistently presented (e.g., heading and caption styles, numbering).
- D2.5** Understand the issues related to using other languages, especially French, in an English context (e.g., capitalization, italicization, diacritical marks) and edit for consistency.

D3 Accuracy

- D3.1** Correct or query general information that should be checked for accuracy (e.g., quotations, URLs) using standard research methods and tools (e.g., dictionaries, maps, calculators, search engines).
- D3.2** Review visual material (e.g., labels, cross-references, callouts on illustrations) and organizational information (e.g., tables of contents, menus and links in online documents) to ensure they are accurate, and correct or query as required.
- D3.3** Correct or query errors in material containing statistics, mathematics and numerals (e.g., calculations, incorrect imperial or metric conversions, incorrect totals in tables).

- D3.4** Identify and query any spelling or grammar errors within quotations to ascertain whether they were errors in the original text.

D4 Completeness

- D4.1** Check for missing information and query or supply missing elements (e.g., captions and headings, web links, contact details).
- D4.2** Recognize and flag places where citations are needed (e.g., quotations without attributions, unsupported generalizations in academic work, tables without sources).
- D4.3** Recognize elements that require copyright acknowledgement and permission to reproduce (e.g., quotations, multimedia, visual elements). Check that permissions have been obtained. If necessary, bring the matter to the appropriate person.

E. Standards for Proofreading

Proofreaders examine material after its textual and visual elements have been laid out to correct any errors and confirm that the design effectively supports communication.

Proofreading is described here as a separate, final editorial stage; however, some projects might require combining it with other editorial stages (e.g., copy editing) because of financial or time restraints.

A professional proofreader meets the Standards in Part A: The Fundamentals of Editing and meets the following Standards.

E1 General practices

- E1.1** Recognize the advantages and disadvantages of various proofreading strategies (e.g., proofreading on screen or on paper, increasing screen magnification) and apply the appropriate strategy for the material and the scope of the project. This may also extend to accessibility requirements (see Part A: The Fundamentals of Editing).
- E1.2** Proofread the material in the intended medium whenever possible.
- E1.3** Adhere to the editorial style sheet for the material and add to it if necessary. If no style sheet is provided and if applicable, prepare one and update it as proofreading progresses.
- E1.4** In the first round of proofreading, read the material word by word and scrutinize visual elements as the task requires, comparing it with the edited copy if supplied.

- E1.5** In each subsequent round of proofreading, refrain from reading the entire text (unless instructed to do so) but check that all changes have been made as requested and that they do not introduce new problems (e.g., check line and page breaks, text flow, visual elements, table of contents, navigation bar).
- E1.6** Incorporate alterations from authors and other individuals, using judgment and tact, ensuring that the changes are easy to spot. Where comments conflict, use judgment or consult the project owner to mark appropriate alterations.
- E1.7** At all rounds of proofreading, flag or correct egregious errors but refrain from undertaking structural, stylistic or copy editing tasks unless authorized to do so.
- E1.8** At each round of proofreading, choose changes that will be the least costly or the most appropriate, given the production process, schedule, medium, purpose and type of material (e.g., contact information must be corrected but inconsistent capitalization might be left as is).

E2 Error correction

- E2.1** Query, or correct if authorized to do so, inconsistencies and errors (e.g., in spelling, punctuation, facts, visual elements, navigation elements, metadata). Use judgment about the degree to which such queries and corrections are called for (e.g., different browsers format text differently, so there is no point in marking hard word breaks or table column measures in web content).
- E2.2** Ensure that each proof contains all the copy and any additional elements prepared for layout (e.g., visual and audio elements, alt text, captions, acknowledgements).

- E2.3** Flag or fix typographical and formatting errors, inconsistencies and irregularities in text, tables, figures, and visual elements, paying special attention to problem areas (e.g., headers and footers, folios, verso–recto orientation, covers, tables of contents, and opening and ending paragraphs).
- E2.4** Check consistency and accuracy of elements in the material (e.g., cross-references, running heads, captions, web page title tags, links, metadata).
- E2.5** Check end-of-line word divisions and mark bad breaks for correction in all formatted copy other than web content.
- E2.6** Understand design specifications and ensure they have been followed throughout (e.g., alignment, heading styles, line length, space around major elements, rules, image resolution, colour separations, appearance of links).
- E2.7** Recognize and flag matters that may affect later stages of proofreading (e.g., page cross-references; placement of visual elements; alterations that will change layout, indexing or web navigation).
- E2.8** For web content, ensure that all links lead to the intended source.

Appendix

Related Editorial Skills

Acquisitions editing

Acquisitions editing is evaluating proposals or manuscripts to ensure their fit with the publisher's mandate, guidelines and other titles, as well as their commercial potential.

It includes the following tasks:

- assessing the quality, originality, accuracy, currency and significance of written expression
- estimating the editing required
- pitching selected manuscripts to the publisher or editorial committee

It may also include the following tasks:

- developing relationships with agents
- contracting and liaising with writers
- researching underserved topics, themes or trends, and soliciting manuscripts to fill these areas
- identifying promising writers from whom to solicit manuscripts

Comparative editing

Comparative editing is comparing the content of a translated text to its source text to ensure the translation is faithful to the original. Comparative editing often includes aspects of stylistic editing and copy editing, and should be done by an editor fluent in both the source language and the target language.

Electronic coding or tagging

Electronic coding or tagging is inserting codes or styles into a document to indicate the document hierarchy and design elements.

Fact checking

Fact checking is checking the accuracy of facts, citations and quotes.

Related tasks include citation checking or reference checking.

Formatting

Formatting content according to the client's or designer's instructions or template may include the following tasks:

- sizing and placement of art
- setting front and back matter
- establishing design
- creating cover art
- applying cascading style sheet (CSS) coding
- formatting indexes

Formatting is also known as desktop publishing or production design.

Indexing

Indexing is producing an alphabetical (or otherwise ordered) list of names, places, subjects and concepts that appear in a work. It includes the following tasks:

- reading and analyzing the work
- identifying significant subjects within the work and relationships between them
- choosing concise terms to represent the chosen subjects
- arranging terms into entries consisting of headings, subheadings, locators (such as page numbers) and cross-references

Localization

Localization is revising a document to make it meet the needs of readers in a specific place. It can include the following tasks:

- ensuring that the words used are those used by the intended readers (e.g., *car trunk* vs. *car boot*)
- editing for local spelling, grammar and usage
- using local examples where relevant
- ensuring that such factors as the brand names of drugs are those that are used in that region
- checking that cultural and religious details are appropriate (e.g., Christian vs. Islamic wedding details)
- checking for metric and imperial measures
- checking for mentions of legal details

A related task is internationalization, which is ensuring that a document doesn't have details that are specific to a location.

Manuscript evaluation

Manuscript evaluation involves writing a detailed memo to help a writer revise a document, usually a book manuscript. The evaluation is a systematic examination of the strengths and weaknesses of the document and gives specific guidance about how to revise it to make it more publishable. Most evaluations follow a set of headings that guide the editor. The headings are intended to structure the memo and ensure that the editor does not miss key aspects of the manuscript.

Manuscript evaluation also involves assessing the content and organization of a work, and commenting in depth on such factors as characterization, dialogue, setting, plot, structure, subject relevance, believability, research required and potential legal issues. It can also involve evaluation of the following:

- technique and style
- clarity
- voice
- tone
- audience appropriateness

It includes providing detailed comments on the marketability of the work and suggesting ways to make it more so. This evaluation is intended to guide the writer or publisher through the process of rewriting or editing the work.

Manuscript evaluation is also known as critiquing.

Production editing

Production editing is coordinating and supervising design, formatting and proofreading stages, and ensuring integration of design and content. It may include the following tasks:

- formatting
- proofreading
- inputting changes
- locating, negotiating with and supervising designers, artists and printers
- creating production schedules

Production editing is also known as production coordination.

Project editing

Project editing is coordinating all stages of a project, from an initial proposal or draft material to the final product and incorporating input from the writer and others.

If necessary, it includes getting all approvals throughout the process. It can also involve coordinating long-term projects, such as building large websites. It may include the following tasks:

- editing
- budgeting
- scheduling
- hiring
- supervising

Project editing is also known as developmental editing or editorial management.

Rewriting

Rewriting is writing new material based on content that has been supplied. It may include doing research and fact checking.

Visual research

Visual research involves locating suitable still images, artwork, illustrations, maps, diagrams and video. It may include the following tasks:

- reading the work and composing lists of visuals
- preparing permissions logs
- setting and maintaining budgets
- locating copyright holders
- arranging and supervising photo shoots
- organizing images for scanning
- acquiring images of appropriate quality in electronic form
- preparing image descriptions and artists' biographical information
- obtaining permission releases (including model and location releases)
- writing labels, captions or source lines
- preparing acknowledgement copy
- negotiating usage fees
- requesting licences and invoices
- sending final usage letters
- fulfilling contractual obligations, such as requesting sample pages for approval
- updating clients' rights management databases
- submitting final permissions logs and paperwork

Visual research is also known as image research, picture research or photo research.

Web editing

Web editing is editing and updating the content of web pages, including text, images and links. It includes the following tasks:

- checking links to ensure they point to the right places
- checking that the text in links accurately reflects where the link goes
- reorganizing or revising print copy for the web
- editing or writing web copy that is aligned with best practices
- proofreading final websites and checking for consistency of all site elements
- identifying potential copyright issues

Web editing may also include the following tasks:

- reviewing websites on multiple platforms (e.g., to ensure that links are substantial enough for touchscreen users)
- advising on accessibility issues
- reviewing or creating information architecture
- implementing changes using a content management system



EDITORS
CANADA