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# How to Check Consistency and Enforce Your House Style: Using PerfectIt for Faster and Better Results



Daniel Heuman  
CEO and Founder

# DANIEL HEUMAN

- Founder and CEO of PerfectIt
- Developed original version of PerfectIt
- Spoken at SENSE, CIEP, ACES, EFA, AMWA, EMWA, NWEG, BAEF, and others.



# PART I: OVERVIEW

- Why are we here?
- What is PerfectIt?
- What errors does it find?
- Why use it?
- Demo



A woman with dark hair is sitting at a desk, focused on writing in a notebook with a blue pen. A laptop is open to her right. The background is a blurred office or library setting. A semi-transparent blue banner is at the top of the image.

WHY ARE WE HERE?

WHY DO YOU WRITE/EDIT?

# WHAT IS YOUR (ACTUAL) JOB?

- Make sense of:
  - Complexity
  - Multiple authors
  - Poor writing
- Make the best impression with words
- Focus readers on the story and meaning
- Eliminate errors
- Manage your author and stakeholders
- All under time/budget pressure (or both)
- Run a business!

# WHAT IS PERFECTIT?



Add-in for MS  
Word



Launched  
in 2009



Checks  
consistency



Enforces  
house styles

# POLL

Have you used PerfectIt before?

# WHAT DOES PERFECTIT DO?

## Consistency

- Hyphenation (broad based/broad-based)
- Numbers (numerals/words)
- Spelling (advisor/adviser)
- Capitalization (University/university)
- Header capitalization
- Lists (punctuation and capitals)

## Style/Corrections

- Abbreviations
- Common typos
- Brackets and quotes left open
- Comments left in text



# WHY USE PERFECTIT?

- Consistency mistakes are difficult to find
- Spotting consistency mistakes is time-consuming. It's better to spend that on translation quality.
- Write your way – no templates, forms or markers
- Existing checking software:
  - Can't find consistency mistakes
  - Isn't built for professionals
- Finds consistency errors in seconds

# VERSIONS

- PerfectIt 4
  - Windows edition
  - Released June 2019
  - Customizable
- PerfectIt Cloud
  - Mac-compatible
  - Install direct from the Office Store
- All purchases since May 2018 include both versions.

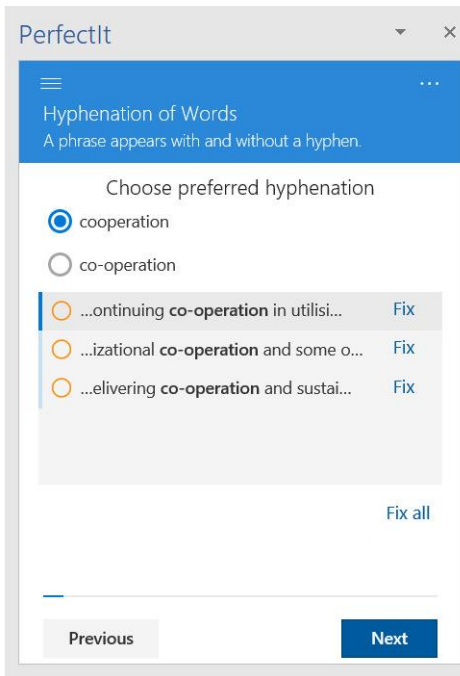
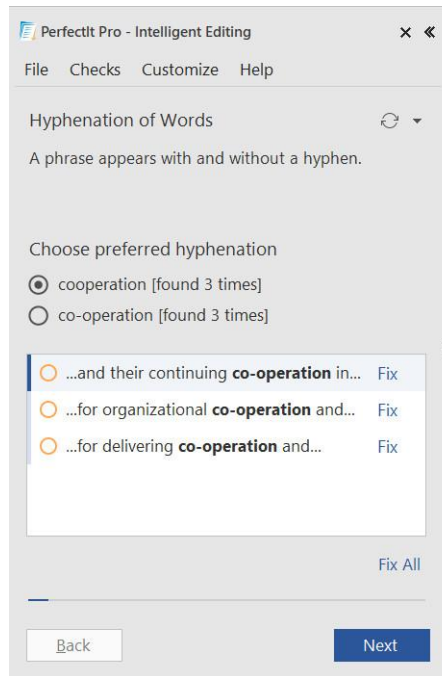
# WHO USES PERFECTIT?

- Over 8000 licenses in 72 countries
- Professional editors, proposal writers, medical writers, translators, lawyers, and technical writers
  - Thousands of editors (over 500 members of CIEP)
  - Medical writers voted PerfectIt as their third most essential tool\*
  - Working with ASTC since 2010
- Major Companies
  - UnitedHealthcare
  - Cessna Aircraft
  - Johnson & Johnson
- Government and Transnational Institutions
  - USA (CDC, LoC, NASA), Canada (DND, HC, CADTH)
  - Australia (DIIS, DoD), UK (MAIB, NICE), South Africa (DPME), New Zealand (ComCom, MBIE)
  - European Union (ECB, DGT, EMCDDA, Council of Europe)
  - United Nations (IARC, WHO, ILO, IFAD, UNFCCC, WTO, STL, UNRISD)
  - Other (IAEA, OECD, IEA, NEA)



\* Source: Nicosia M. Results from the 2016 Freelance Medical Communicator Tools of the Trade Survey. AMWA Journal. 2017;32(3):105-112.)

# CHOOSE YOUR VERSION

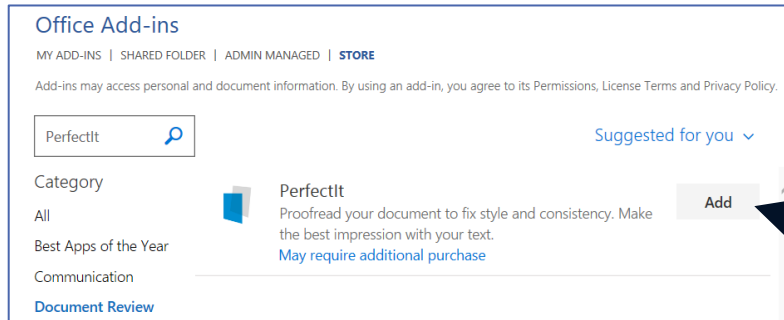
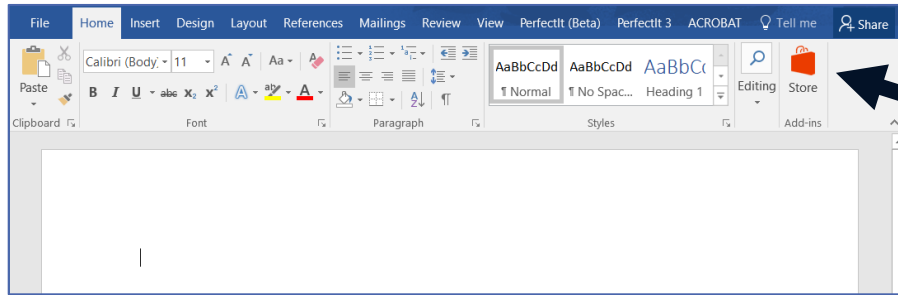


# VERSIONS

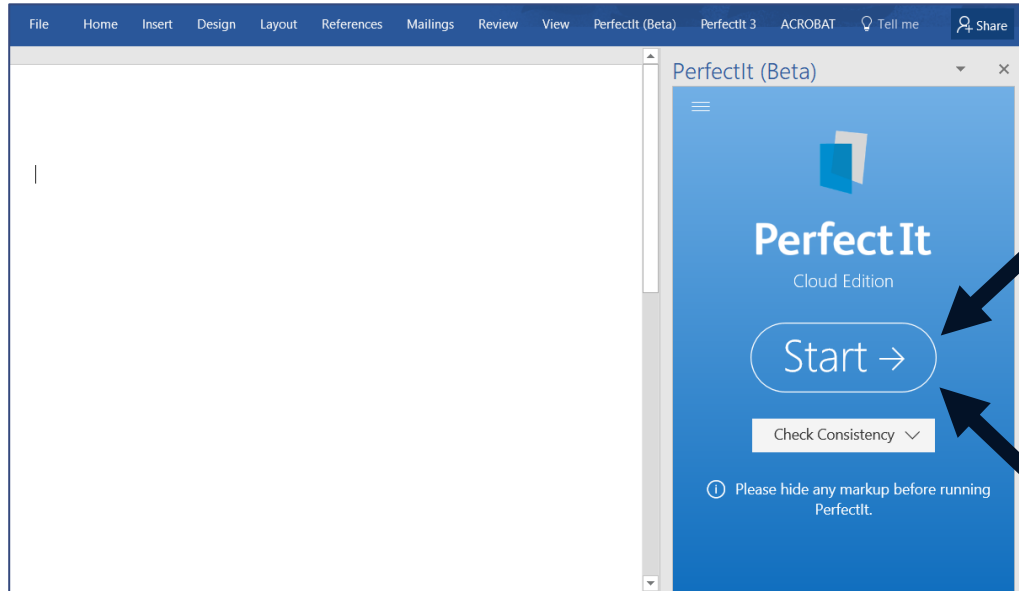


- **PerfectIt 4**
  - Windows edition
  - Released June 2019
  - Customizable
- **PerfectIt Cloud**
  - Mac-compatible
  - Install direct from the Office Store
- **All versions require MS Word to use**

# INSTALLATION: ONLINE DOWNLOAD OR OFFICE STORE



# WHICH BUTTON DO YOU PRESS FIRST?



# SECURITY

**PerfectIt can be downloaded on PCs and is entirely local**

Once downloaded, it does not connect to the internet or local network in any way.

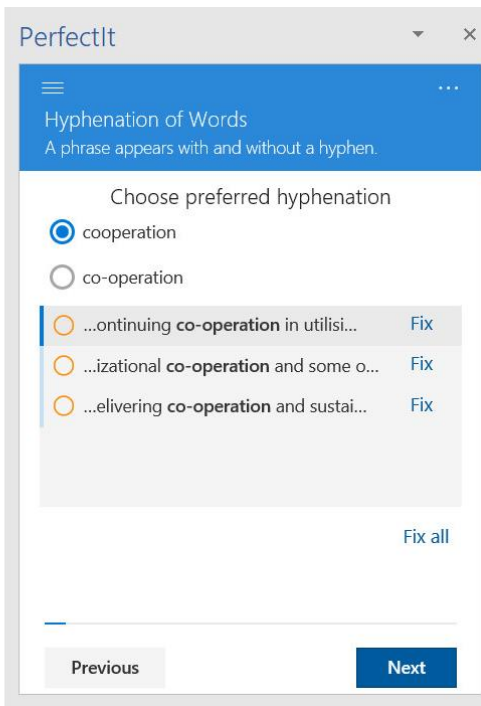
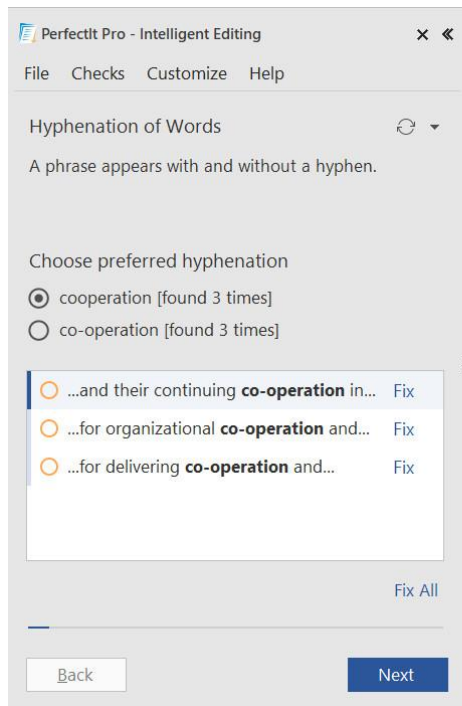
It **does not transmit any data anywhere**

With PerfectIt Cloud (Mac):

- Nothing is sent anywhere without your permission
- Secure connection (data sent via https)
- Servers located within Northern Europe and Canada
- Documents only exist on our server temporarily
- While on server, documents are encrypted



# DEMO



# PRICING (USD, EXCLUDING VAT)



## Licences

- 1 User: \$70 per year
- 20 Users: \$1127 per year
- 100 Users: \$3900 per year



## Discount for Editors Canada Members

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- 30% Discount on a single license (\$49 per year)

# QUESTIONS ON PART I?

## PART II: OVERVIEW

- Objectives
- What Are House Styles?
- Using Built-In Style Sheets
- Creating Style Sheets
- Editing Settings and Style Points
- Find and Suggest

# OBJECTIVES

- Goal is to make you comfortable with PerfectIt's Style Sheet Editor
- Comprehensive video tutorials on our website and YouTube:
  - <https://intelligentediting.com/videotutorials>

# POLL

Have you customized style in PerfectIt before using the style sheet editor?

# WHAT ARE BUILT-IN STYLES?

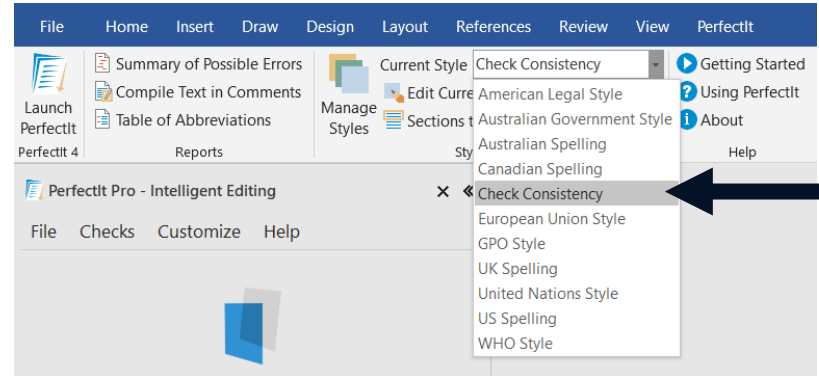
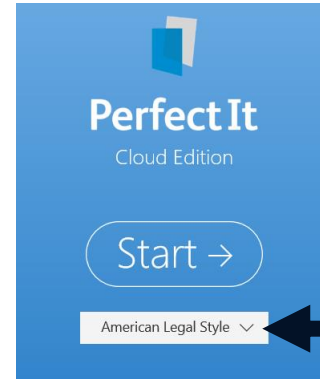
- Wide variety
- PerfectIt can check
  - Spelling
  - Hyphenation
- PerfectIt cannot check
  - Grammar
  - References
- PerfectIt can sometimes check
  - Numbers
  - Bullets
  - Personal titles
  - Capitalization

**PerfectIt** styles are for enforcing preferences in hyphenation, spelling and other terminology

**PerfectIt** styles do NOT relate to formatting or any other aspect of Word styles

# BUILT-IN STYLE SHEETS

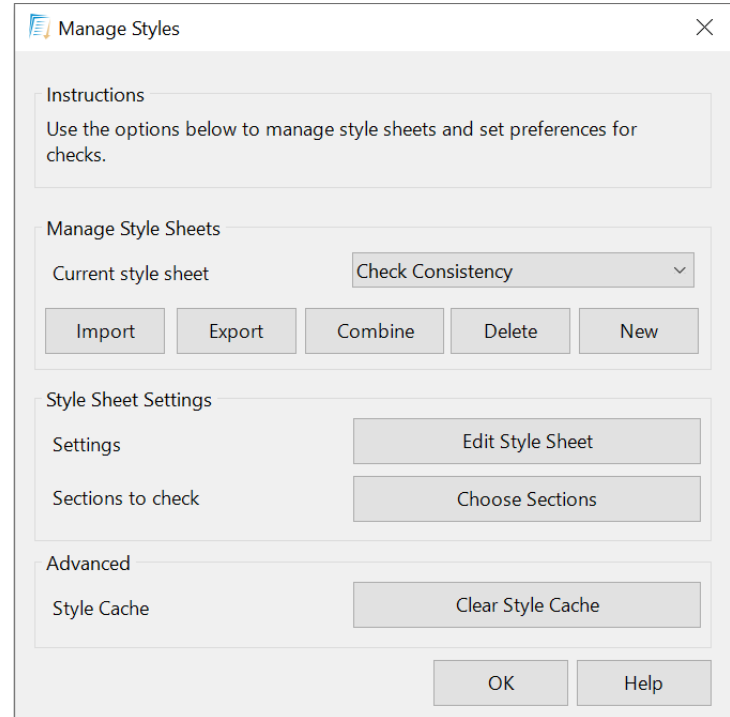
- Style sheets available in PerfectIt:
  - UK, US, Canadian, and Australian Spelling
  - EU, UN, WHO, GPO, Australian Government Style, American Legal Style
- Select from the dropdown list





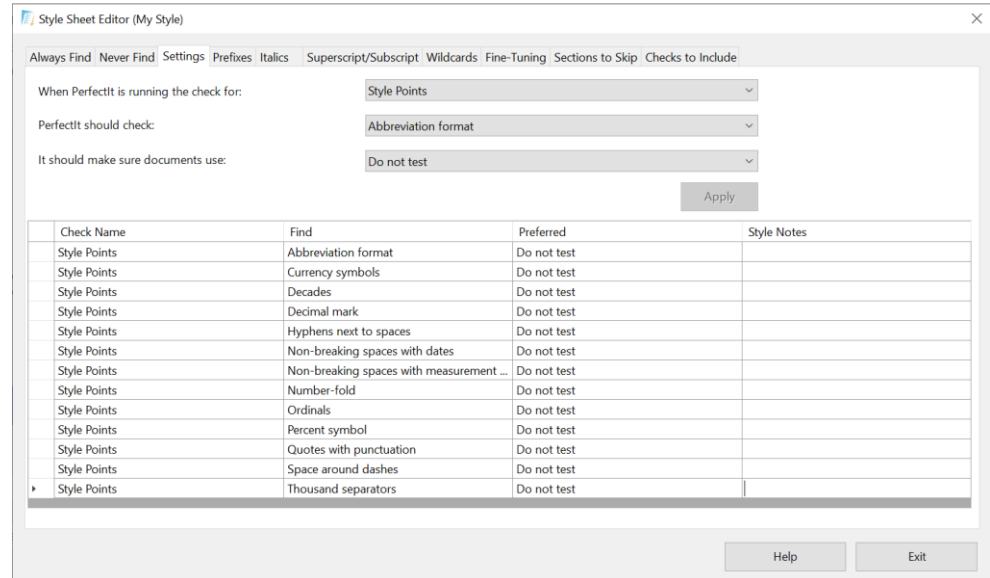
# HOW TO CREATE A STYLE SHEET

- Open Word
- Click the PerfectIt Ribbon
- Click 'Manage Styles'
- Click 'New'
- Decide what to base it on  
(usually Check Consistency)
- Give the style sheet a name



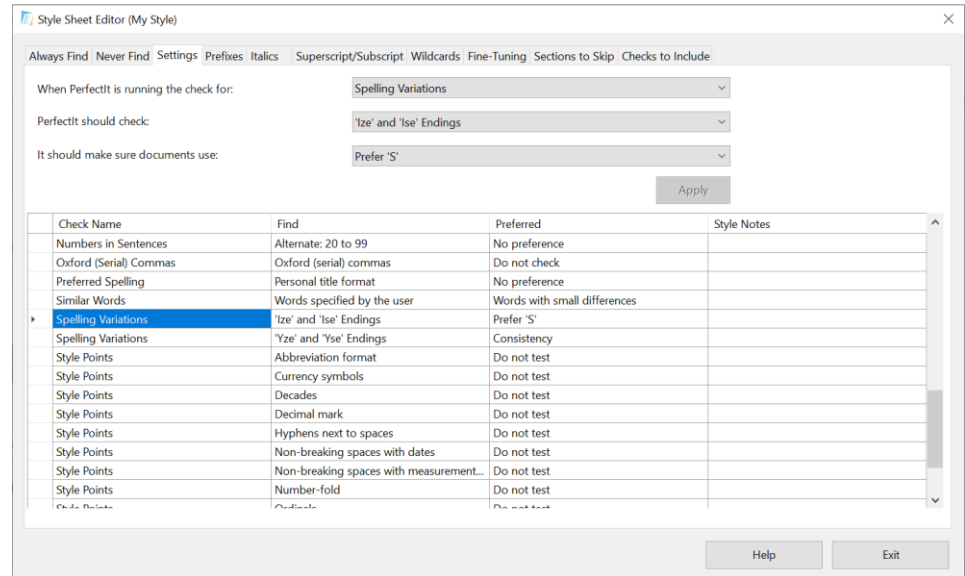
# PERFECTIT'S STYLE SHEET EDITOR

- Select your style, click 'Edit Current Style'
- The tool for editing style sheets



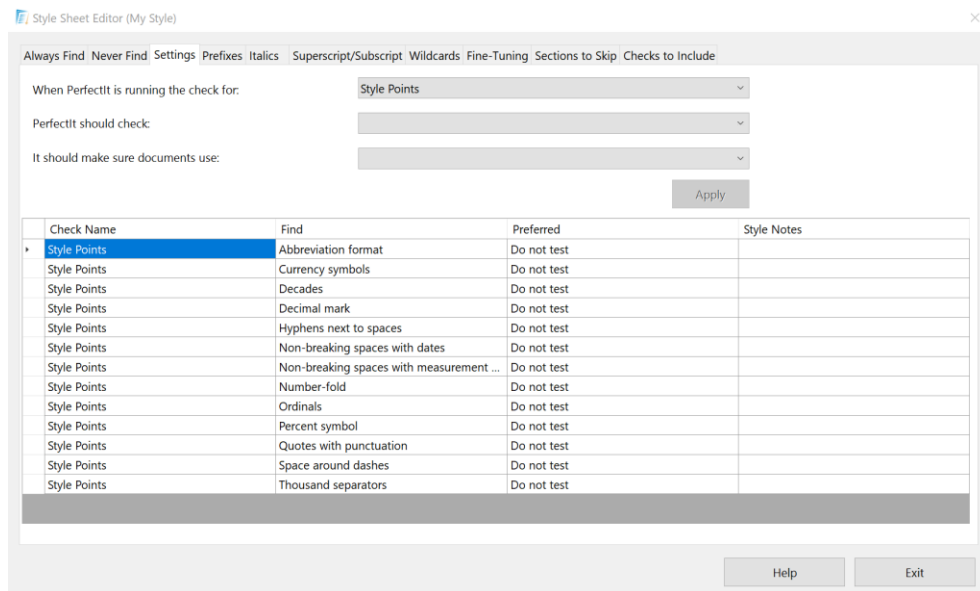
# HOW TO EDIT SETTINGS

- Click the 'Settings' tab in the Style Sheet Editor
- Scroll down to 'Spelling Variations'
- Click on 'Ise' and 'Ize' Endings
- Choose 'Prefer Z',
- Click 'Apply'



# SET PREFERENCES FOR STYLE POINTS

- Same controls as editing settings
- Set preferences for:
  - Abbreviation format
  - Currency preferences
  - Decades
  - Decimals
  - En dashes
  - Ordinals
  - And more!



# FIND/SUGGEST

- Click the 'Always Find' tab in the Style Sheet Editor
- In the top dropdown, click 'Hyphenation of Words'
- In the first test box, type 'e-mail'
- In the second box, type 'email'
- Click 'Add'
- Note: Each pair is exact



# FIND/SUGGEST

- Click the 'Always Find' tab in the Style Sheet Editor
- In the top dropdown, click 'Spelling Variations'
- In the first test box, type 'adviser'
- In the second box, type 'advisor'
- Click 'Add'



# HOW TO ADD A USER NOTE

- Click the 'Always Find' tab in the Style Sheet Editor
- In the top dropdown, click 'Phrases to Avoid/Consider'
- In the first test box, type 'delay'
- Click 'Add'
- In the style sheet editor click 'delay'.
- Scroll to the right and in the 'Style Notes' column, type 'Watch for false friends. Make sure 'deadline' or 'limit' are not intended (délai does not translate to 'delay')

# THE REST WORKS THE SAME WAY

Some more examples:

Capitalization

Acronyms

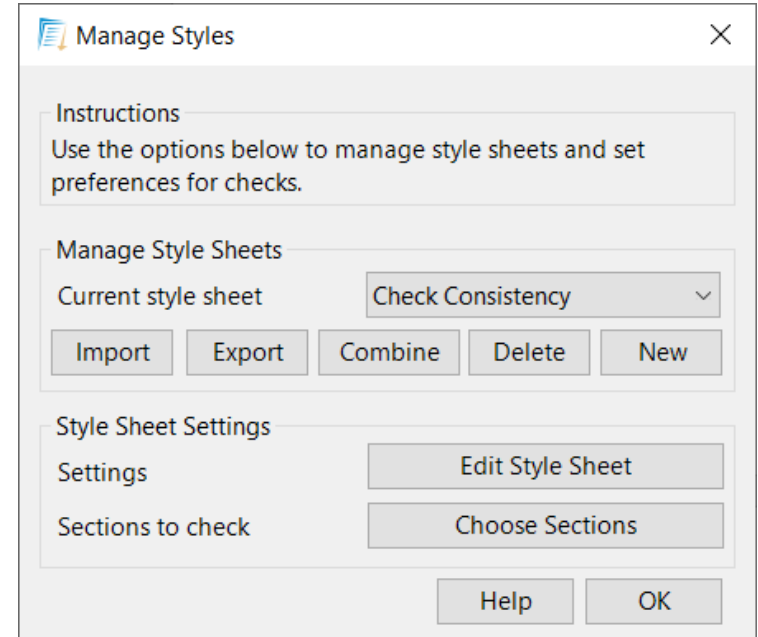


# ADVANCED CONCEPTS

- Sharing Styles
- Style Layers
- Wildcard Find & Suggest

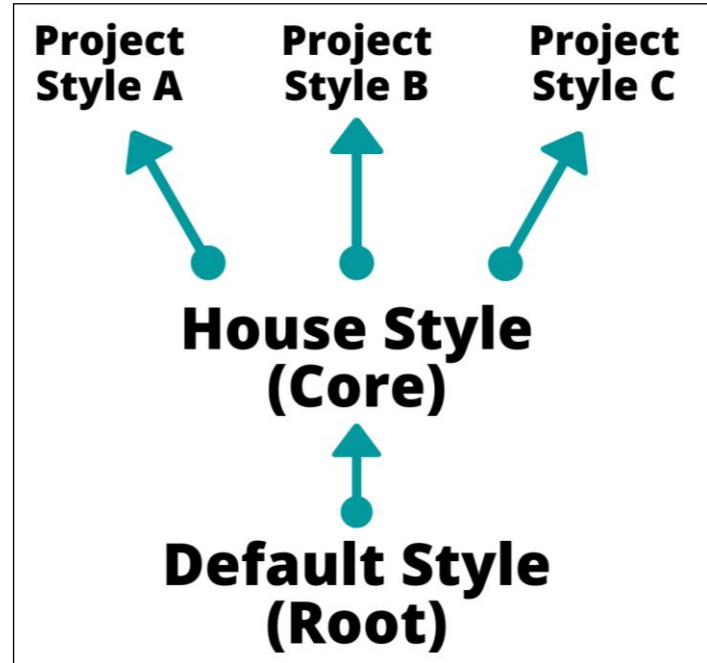
# SHARING STYLES

- Click 'Export'
- Choose if you want the style to be editable
- Share the file
- Click 'Import'



# STYLE LAYERS

- Create layers of Styles
- Use Combine to bring them together
- Different styles for each client, department, or company



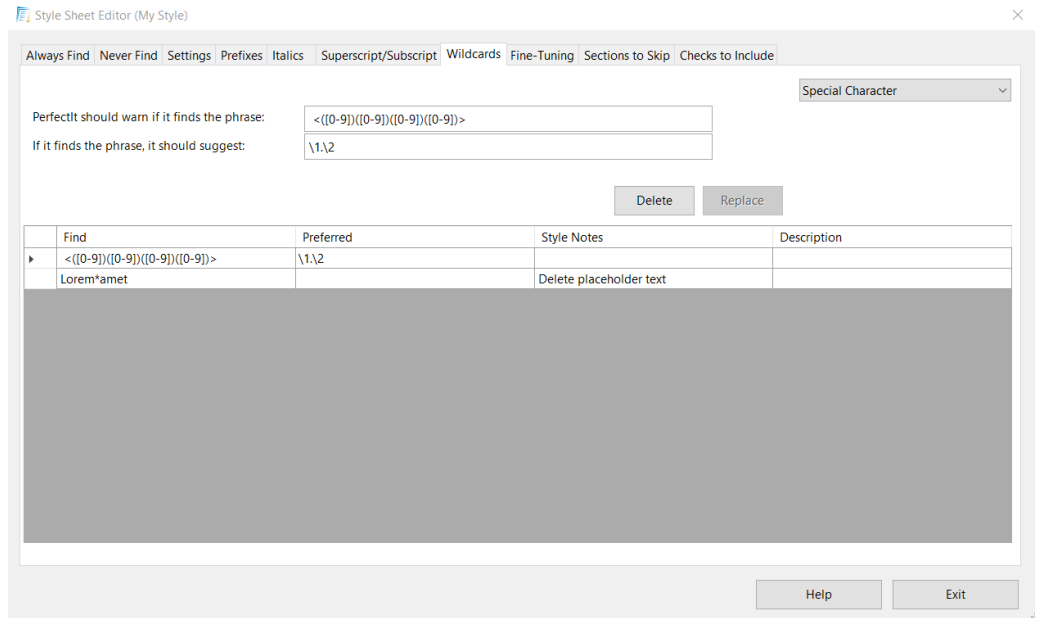
# WILDCARDS



- Jack Lyon's Wildcard Cookbook for MS Word  
<https://intelligentediting.com/wildcardcookbook>
- Graham Mayor's reference list  
<https://wordmvp.com/FAQs/General/UsingWildcards.htm>

# WILDCARD FIND AND SUGGEST

- Click 'Wildcards'
- Enter in all your wildcard F&R patterns at once



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# QUESTIONS?



[support@intelligentediting.com](mailto:support@intelligentediting.com)



[@IntelligentEdit](https://twitter.com/IntelligentEdit)