

¶ What Copyeditors Do

Copyeditors always serve the needs of three constituencies:

- the author(s)—the person (or people) who wrote or compiled the manuscript
- the publisher—the individual or company that is paying the cost of producing and distributing the material
- the readers—the people for whom the material is being produced

All these parties share one basic desire: an error-free publication. To that end, the copyeditor acts as the author's second pair of eyes, pointing out—and usually correcting—mechanical errors and inconsistencies; errors or infelicities of grammar, usage, and syntax; and errors or inconsistencies in content. If you like alliterative mnemonic devices, you can conceive of a copyeditor's chief concerns as comprising the "4 Cs"—clarity, coherency, consistency, and correctness—in service of the "Cardinal C": communication.

Certain projects require the copyeditor to serve as more than a second set of eyes. Heavier intervention may be needed, for example, when the author does not have native or near-native fluency in English, when the author is a professional or a technical expert writing for a lay audience, when the author is addressing a readership with limited English proficiency, or when the author has not been careful in preparing the manuscript.

Sometimes, too, copyeditors find themselves juggling the conflicting needs and desires of their constituencies. For example, the author may feel that the manuscript requires no more than a quick read-through to correct a handful of typographical errors, while the publisher, believing that a firmer hand would benefit the final product, instructs the copyeditor to prune verbose passages. Or a budget-conscious publisher may ask the copyeditor to attend to only the most egregious errors, while the author is hoping for a conscientious sentence-by-sentence polishing of the text.

Different publishing environments tend to favor different constituencies. Self-publishing authors—sometimes called independent, or *indie*, authors—may hire an editor directly; as both author and publisher, indie authors control all decisions about their manuscripts. Companies that serve indie clients or that publish writers with special subject expertise or artistic license usually cater to authors as well, whereas commercial and corporate publishers may elevate financial goals or the needs of end users over their authors' prerogatives. Regardless of the culture and politics of a particular working environment, copyeditors always serve other constituencies, not their own vanity, and must therefore exercise a degree of self-effacement. The mantra of professional copyeditors everywhere is this: "It's not my manuscript."

Traditional book and journal publishers and some of the large production services often make an initial determination of a manuscript's editorial needs and do some preliminary manuscript preparation before transmitting the job. Copyeditors who work for such clients are thus usually given general instructions, and sometimes even an edited sample, specifying how light or heavy a hand to apply; manuscript files may already be cleaned up and prepared for editing, permissions secured, and the illustration program set. But no one looks over the copyeditor's shoulder, giving detailed advice about how much or how little to do line by line. Publishing professionals use the term *editorial judgment* to denote a copyeditor's intuition and instincts about when to intervene, when to leave well enough alone, and when to ask the author to rework a sentence or a paragraph. In addition to having a good eye and ear for language, copyeditors must develop a sixth sense about how much effort, and what kind of effort, to put into each project that crosses their desk.

In the pre-computer era, copyeditors used pencils or pens and marked their changes and questions on a typewritten manuscript. Today few copyeditors still work on hard copy; most use a computer and key in their work—a process variously called *on-screen editing*, *electronic manuscript (EMS) editing*, or *online editing*. This last term can be misleading, since editing on a computer does not necessarily involve a connection to the internet or to a local area network. But in practice, on-screen editors need an internet connection to access online resources—online reference works, file storage and exchange services, and backup utilities—as they work. A few on-screen editing and production systems are in fact entirely web-based.

Some on-screen editors make do with the limited functionality of open-source word processors, such as Apache OpenOffice or LibreOffice, or of the proprietary Pages (Apple) or InCopy (Adobe). But many editors currently use Microsoft Word and must, at minimum, develop sufficient skill in this software to edit efficiently. Editors in an office or other environment where multiple individuals work on a document together may employ a collaborative writing application, such as Google Docs, following a carefully defined work process to ensure version control (see “Computer Skills” in chapter 2). Or editors may—somewhat reluctantly—undertake the laborious editing of PDF files using a stylus or the markup and comment tools of free or purchased PDF readers, such as Adobe Acrobat Reader or Adobe Acrobat Pro. Clients may sometimes expect an editor to correct material prepared in other applications (even if marking changes is cumbersome), such as Excel, PowerPoint, or InDesign, or to use the client's own proprietary software or production platform. Indeed, some of these current applications may be superseded by entirely new tools before the information in this paragraph is even published. But here is the point: given the range of possible requirements for on-screen work and the continuous evolution of technology, editors must cultivate proficiency in several major applications, systematically follow new technological developments affecting their work, and regularly update their hardware, software, and technical skills.

Regardless of the medium and the editing tools, a copyeditor must read a document letter by letter, word by word, with excruciating care and attentiveness. In many ways,

being a copyeditor is like sitting for an English exam that never ends: at every moment, your knowledge of spelling, grammar, punctuation, usage, syntax, and diction is being tested.

You're not expected to be perfect, though. Every copyeditor misses errors here and there. According to one study of human error rates, 95 percent accuracy is the best a human can do. To pass the certification test administered by Editors Canada, an applicant must score approximately 80 percent or higher.¹ And, as experienced editors know, accuracy declines in an error-riddled manuscript. Software tools such as the ones listed in the Selected Bibliography can reduce the number of distracting, low-level faults before an editor even begins reading in earnest. Many traditional editorial processes also winnow errors by requiring multiple reviews of a text by different sets of eyes—peer evaluators or beta readers, editors, authors, proofreaders—at successive stages of production. Still, despite every care, fugitive faults are inevitable. In the published text they will twinkle like tiny fairy lights, probably visible only to the mortified copyeditor and a few exceptionally discriminating readers.

Don't beat yourself up over such tiny oversights; learn from them. And always respect the four commandments of copyediting:

1. Thou shalt not lose or damage the manuscript or muddle versions of the files.
2. Thou shalt not introduce an error into a text that is correct. As in other areas of life, in copyediting an act of commission is more serious than an act of omission.
3. Thou shalt not change the author's meaning. In the hierarchy of editorial errors, replacing the author's wording with language the copyeditor simply likes better is a transgression, but changing the author's meaning is a mortal offense.
4. Thou shalt not miss a critical deadline.

PRINCIPAL TASKS

Copyediting is one step in the iterative process by which a manuscript is turned into a final published product (e.g., a book, an annual corporate report, a newsletter, a web document). Here, we will quickly survey the copyeditor's six principal tasks; the procedures and conventions for executing these tasks are described in the chapters that follow.

1. Adrienne Montgomerie, "Error Rates in Editing," *Copyediting*, Aug. 7, 2013, <https://www.copyediting.com/error-rates-in-editing/>. Is there a difference in error rates between hard-copy editing and on-screen editing? There are too many variables for a scientifically valid comparison, but most editors have adapted to both the benefits and the limitations of on-screen work. Besides using the powerful tools available in word processing applications to reduce much time-consuming drudgery, they typically make adjustments to the digital medium—e.g., eliminating on-screen distractions from incoming messages, magnifying text to suppress the habit of scanning rather than reading digital content closely, changing background colors on the monitor, reducing the brightness of the backlit screen, and taking frequent short breaks to avoid eyestrain.

1. MECHANICAL EDITING

The heart of copyediting consists of making a manuscript conform to an *editorial style*, also called *house style*—a term deriving from the practices of a given “publishing house” or a company’s “house of business.” Editorial style includes

- spelling
- hyphenation
- capitalization
- punctuation
- treatment of numbers and numerals
- treatment of quotations
- use of initialisms, acronyms, and other abbreviations
- use of italics and bold type
- treatment of special elements (e.g., headings, lists, tables, charts, graphs)
- format of footnotes or endnotes and other documentation

Mechanical editing comprises all editorial interventions made to ensure conformity to house style. There is nothing mechanical, however, about mechanical editing; it requires a sharp eye, a solid grasp of a wide range of conventions, and good judgment. The mistake most frequently made by novice copyeditors is to rewrite portions of a text (for better or for worse, depending on the copyeditor’s writing skills) and to ignore such “minor details” as capitalization, punctuation, and hyphenation. Wrong! Whatever else you are asked to do, you are expected to repair any mechanical inconsistencies in the manuscript.

For an example of the differences purely mechanical editing can make in the look and feel—but not the meaning—of a document, compare these selections from articles that appeared on the same day in the *New York Times* and the *San Francisco Examiner*.

New York Times

February 22, 1987

TARGET QADDAFI

By Seymour M. Hersh

Eighteen American warplanes set out from Lakenheath Air Base in England last April 14 to begin a 14-hour, 5,400-mile round-trip flight to Tripoli, Libya. It is now clear that nine of those Air Force F-111’s had an unprecedented peacetime mission. Their targets: Col. Muammar el-Qaddafi and his family. . . .

Since early 1981, the Central Intelligence Agency had been encouraging and abetting Libyan exile groups and foreign governments, especially those of Egypt and France, in their efforts to stage a coup d’état. . . . Now the supersonic Air Force F-111’s were ordered to accomplish what the C.I.A. could not.

San Francisco Examiner

February 22, 1987

TARGET GADHAFI

By Seymour M. Hersh

Eighteen U.S. warplanes set out from Lakenheath Air Base in England last April 14 to begin a 14-hour, 5,400-mile round-trip flight to Tripoli, Libya. It is now clear that nine of those Air Force F-111s had an unprecedented peacetime mission. Their targets: Col. Moammar Gadhafi and his family. . . .

Since early 1981, the CIA had been encouraging and abetting Libyan exile groups and foreign governments, especially those of Egypt and France, in their efforts to stage a coup d’état. . . . Now the supersonic Air Force F-111s were ordered to accomplish what the CIA could not.

Which is correct? (Or which is “more correct?”): American warplanes or U.S. warplanes? Col. Muammar el-Qaddafi or Col. Moammar Gadhafi? F-111’s or F-111s? coup d’état or coup d’etat? C.I.A. or CIA? In each case, the choice is not a matter of correctness per se but of preference, and the sum total of such preferences constitutes an editorial style. A copyeditor’s job is to ensure that the manuscript conforms to the publisher’s editorial style; if the publisher does not have a house style, the copyeditor must make sure that the author has been consistent in selecting among acceptable variants.

At book publishing firms, scholarly journals, newspapers, and magazines, a house style is generated by having all copyeditors use the same dictionary and the same style manual (e.g., *The Chicago Manual of Style*, *Words into Type*, *The Associated Press Stylebook*, *Publication Manual of the American Psychological Association*). In contrast, companies that produce documents, reports, brochures, catalogs, or newsletters but do not consider themselves to be bona fide publishers often rely on in-house style guides, on general lists of do’s and don’ts, or on the judgments and preferences of copyeditors and *editorial coordinators*.² Besides a few guidelines for the mechanics listed above (and possibly some idiosyncratic preferences reflecting the particular business culture), a company’s house style guide is likely to contain specific instructions for handling its corporate and product names, trademarks, and logos.

The purpose of a house style is to ensure consistency within multiauthor publications (magazines, journals, reports, collaborative books), within a series of publications, and across similar publications. Rigorous consistency is needed, for example, in the form of source citations to support online searches for bibliographical information in a database of journal issues. A house style may also be mandated for purposes of corporate branding. Or it may simply be required for the sake of expediency: editors usually find it easier to enforce a house style than to extrapolate each individual author’s preferences and apply them consistently in that author’s manuscript. But even when a house style exists, it may sometimes yield to an author’s own style choices—at the copyeditor’s discretion and with authorization from the editorial coordinator—owing to special manuscript content, an author’s strongly held preferences, or simple convenience. Case in point: The University of Chicago Press itself, home of the authoritative *Chicago Manual of Style*, allows exceptions to its house style when, for example, an author has consistently followed a justifiable alternative style and Chicago’s editor judges that no value is added by undertaking the substantial work of changing it.

2. CORRELATING PARTS

Unless the manuscript is very short and simple, the copyeditor must devote special attention to correlating its parts. Such tasks include

2. I use the term *editorial coordinator* to denote the person who is supervising an in-house copyeditor or who is assigning work to a freelance copyeditor. In book publishing, this person’s title may be *managing editor*, *chief copyeditor*, *production editor*, or *project editor*. In other industries, the title begins with a modifier like *communications*, *pubs* (short for “publications”), or *documentation* and concludes with one of the following nouns: *manager*, *editor*, *specialist*.

verifying any cross-references that appear in the text
checking the numbering of footnotes, endnotes, tables, and illustrations
specifying the placement of (callouts for) tables and illustrations
checking the content of the illustrations against the captions and against the text
reading the list of illustrations against the captions and comparing the entries in
the list to the illustrations themselves
reading the table of contents against the headings in the manuscript
reading the footnotes or endnotes against the bibliography

Some types of texts require special cross-checking. For example, in cookbooks the list of ingredients that precedes a recipe must be read against the recipe: Is every ingredient in the initial list used in the recipe? Does every ingredient used in the recipe appear in the list of ingredients? Similarly, when copyediting other kinds of how-to texts, one may need to check whether the list of equipment or parts matches the instructions.

3. LANGUAGE EDITING: GRAMMAR, USAGE, AND DICTION

Copyeditors also correct—or ask the author to correct—errors or lapses in grammar, usage, and diction.³ Ideally, copyeditors set right whatever is incorrect, unidiomatic, confusing, ambiguous, or inappropriate without attempting to impose their stylistic preferences or prejudices on the author.

The “rules” for language editing are far more subjective than those for mechanical editing. Most copyeditors come to trust a small set of usage books and then to rely on their own judgment when the books offer conflicting recommendations or fail to illuminate a particular issue. Indeed, the “correct” usage choice may vary from manuscript to manuscript, depending on the publisher’s house style, the conventions in the author’s field, and the expectations of the intended audience.

A small example: Many copyeditors who work for academic presses and scholarly journals have been taught to treat *data* as a plural noun, a convention long upheld by grammatical purists and still observed in economics and in some scientific writing (e.g., The data for 1999 are not available). But copyeditors in corporate communications departments are often expected to treat *data* as a singular noun (The data for 1999 is not available).⁴ Moreover, a corporate copyeditor is likely to accept *1999* as an adjective and

3. *The Chicago Manual of Style* defines *grammar* as “the set of rules governing how words are put together in sentences to communicate ideas”; native speakers learn and usually apply these rules unconsciously (5.1). Grammar includes *syntax* (the construction of phrases, clauses, and sentences) and *morphology* (the forms of words). But “the great mass of linguistic issues that writers and editors wrestle with don’t really concern grammar at all”; rather, they concern *usage*, “the collective habits of a language’s native speakers” (5.249)—especially the habits of educated speakers and the conventions of what is called Standard Written English. *Diction* simply means word choice.

4. The origin of the controversy lies in the etymology of *data*, which is the plural form of *datum* in Latin but functions differently in English: “*Data* occurs in two constructions: as a plural noun (like *earnings*), taking a plural verb and certain plural modifiers (such as *these*, *many*, *a few of*) but not cardinal numbers, and serving as a referent for plural pronouns (such as *they*, *them*); and as an abstract mass

to favor contractions (The 1999 data isn't available). Whether a copyeditor uses *data* as a plural noun with a plural verb or as a mass noun with a singular verb, someone may object. A judicious editor must consult the publisher's style guide and follow the custom of the specific subject matter—or substitute a less vexed word, such as *information*, *statistics*, *facts*, *reports*, or *figures*.

A second example: Between the 1960s and the late 1980s, many prominent usage experts denounced the use of *hopefully* as a sentence adverb, and copyeditors were instructed to revise “Hopefully, the crisis will end soon” to read “It is to be hoped that the crisis will end soon.” Almost all members of the anti-*hopefully* faction have since recanted, though some people, unaware that the battle has ended, continue what they believe to be the good fight.⁵

In navigating such controversies, what should a copyeditor do? The answer in a given situation requires editorial judgment, the thoughtful consideration of such factors as the desired level of formality or informality (the *register*), the author's preferences, the publisher's brand, and the likely reactions of readers.

“Words do not live in dictionaries,” Virginia Woolf observed; “they live in the mind.”⁶ The history of *hopefully* serves as a reminder that there are fads and fashions, crotchets and crazes, in that cultural creation known as usage. For copyeditors who work on corporate publications, a solid grasp of current fashion is usually sufficient. But an understanding of current conventions alone will not do for copyeditors who work on manuscripts written by scholars, professional writers, and other creative and literary authors. To succeed on these types of projects, the copyeditor needs to learn something about the history of usage controversies:

[A copyeditor] should know the old and outmoded usages as well as those that are current, for not all authors have current ideas—some, indeed, seem bent upon perpetuating the most unreasonable regulations that were obsolescent fifty years ago. Yet too great stress upon rules—upon “correctness”—is perilous. If the worst disease in copyediting is arrogance [toward authors], the second worst is rigidity.⁷

In all contested matters of language, then, copyeditors must aim to strike a balance between permissiveness and pedantry. They are expected to correct (or ask the author to correct) locutions that are likely to confuse, distract, or disturb readers, but they are not

noun (like *information*), taking a singular verb and singular modifiers (such as *this*, *much*, *little*), and being referred to by a singular pronoun (*it*). Both of these constructions are standard” (*DEU*, s.v. “data”).

5. For a history of the debate and its resolution in the United States, see *DEU*, s.v. “hopefully”; on the controversy in the United Kingdom, see the 2015 *Fowler's*, s.v. “sentence adverb.” Surprisingly, after years of opposition the Associated Press at last accepted *hopefully* as a sentence modifier meaning “it is hoped,” as noted in the 2015 edition of the *AP Stylebook*.

6. “Craftsmanship,” in *Virginia Woolf: Selected Essays*, ed. David Bradshaw (Oxford: Oxford University Press, 2008), p. 89.

7. William Bridgwater, “Copyediting,” in *Editors on Editing: An Inside View of What Editors Really Do*, rev. ed., ed. Gerald Gross (New York: Harper & Row, 1985), p. 87. (This essay was dropped from the 1993 edition of *Editors on Editing* listed in the Selected Bibliography.)

hired for the purpose of “defending the language” against all innovations, nor of imposing their own taste and sense of style on the author. Novice editors sometimes change an author’s wording to obey a spurious or long-outmoded rule or, worse, simply because “it looks funny” (ILF) or “it sounds funny” (ISF). But when reading a manuscript, the copyeditor must ask, “Is this sentence acceptable as the author has written it?” The issue is *not* “Would William Strunk have approved of this sentence?”⁸ or “If I were the writer, would I have written it some other way?”

4. CONTENT EDITING

Many publishers discourage an excess of developmental initiative during copyediting. But sometimes a copyeditor must call the author’s (or editorial coordinator’s) attention to serious internal inconsistencies, major organizational problems, or the need for additional apparatus, such as tables, maps, or glossary. If so, use discretion: an interruption in the production schedule to address fundamental deficiencies is rarely welcome. Still, self-publishing authors and inexperienced clients, who may not have used a peer-review or beta-reading process to winnow such faults from the manuscript, often depend on the copyeditor’s judgment to flag previously undetected substantive problems. On some projects you may be asked to fix these kinds of problems by doing heavy editing, rewriting, or preparing supplementary content (tasks beyond a copyeditor’s normal responsibilities). More often, though, you will be instructed to point out the difficulty and ask the author to resolve it.

Some editors spot-check a few facts in a manuscript to test for possible inaccuracies, alerting the author or publisher if these random checks suggest the presence of pervasive errors. Copyeditors working in book publishing and corporate communications are not normally responsible for the factual correctness of a manuscript.⁹ But they are expected to offer a polite query about any factual statements that are clearly incorrect.

Manuscript: The documents arrived on February 29, 1985.

Copyeditor’s query: Please check date—1985 not a leap year.

Manuscript: Along the Kentucky-Alabama border . . .

Copyeditor’s query: Please fix—Kentucky and Alabama are not contiguous.

8. The first edition of William Strunk and E. B. White’s perennially popular *Elements of Style*, published in 1959, was based on Strunk’s original 1918 book. Although successive editions of this esteemed classic have guided generations of undergraduate writers, and it is still fondly quoted, many of its idiosyncratic precepts are oversimplified, outdated, or just plain wrong. When judging a sentence, contemporary editors must take into account as much as a century of subsequent language change and linguistic data.

9. In the very different culture of journalism (i.e., newspaper and magazine publishing), copyeditors may be expected to do fact-checking, or the editorial process may include a separate fact-checking function. To be sure, with the advent of digital news media, both copyediting and fact-checking are sometimes abridged—or even omitted—in the rush to publish.

Manuscript: During the Vietnam War, the most divisive in American history, . . .

Copyeditor's query: Accurate to imply that Vietnam was more divisive than the Civil War?

If you have some knowledge of the subject matter, you may be able to catch an error that would go unquestioned by a copyeditor who is unfamiliar with the subject. Such catches will be greatly appreciated by the author, but only if you can identify the errors without posing dozens of extraneous questions about items that are correct. And while your familiarity with a subject may be an asset in identifying the author's lapses, you must beware the dangers of illusory knowledge—what you think you know but don't. When making factual corrections, as when making other editorial emendations, novices are strongly cautioned: before correcting a presumed error, look it up! But don't dive down that rabbit hole of Googling *every* statement of fact, which will waste time and undermine your efficiency. Instead, query internal inconsistencies and suspected errors and ask the author to undertake the necessary research to answer your questions.

Another misdeed you must guard against is inadvertently changing the author's meaning while you are repairing a grammatical error or tightening a verbose passage. And it is never acceptable to alter the author's meaning simply because you disagree with the author or believe that the author could not have meant what he or she said. Whenever the content is unclear or confusing, the copyeditor's recourse is to point out the difficulty and ask the author to resolve it.

Most publishers also expect their copyeditors to help authors avoid inadvertent sexism and other forms of biased language. In addition, copyeditors call the author's attention to any material (text or illustrations) that might form the basis for a lawsuit alleging libel, invasion of privacy, or obscenity.

Validating the originality of an author's work is beyond a copyeditor's scope of duties. But sometimes an editor recognizes or accidentally discovers that an author has appropriated another's content without attribution. If you uncover irrefutable evidence of plagiarism, you have an obligation to advise the publisher of the problem. Sometimes plagiarism is simply the result of carelessness or naiveté ("If it's on the internet, it's free"). But whether an unacknowledged borrowing is inadvertent or intentional, you should point out the problem and politely recommend that proper credit be given.

5. PERMISSIONS

If the manuscript contains lengthy excerpts from a published work that is still under copyright, the copyeditor may be expected to remind the author to obtain permission to reprint them unless the publisher has performed a thorough permissions review prior to copyediting. Permission may also be needed to reprint tables, charts, graphs, and illustrations that have appeared in print. Copyright law and permissions rules also apply to works on the internet. Special rules pertain to the reproduction of unpublished materials (e.g., diaries, letters). Regardless of whether formal permission is required for borrowed content, the copyeditor should ensure that proper source and credit lines are supplied.

6. MARKUP

Copyeditors may be asked to provide *markup* (also called *tagging*, *styling*, or *typencoding*) on the manuscript, that is, to identify those specially configured features of the manuscript other than regular running text. These *elements* of a manuscript include part and chapter numbers, titles, and subtitles; headings and subheadings; lists, extracts, and displayed equations; table numbers, titles, source lines, and footnotes; and figure numbers and figure captions. In addition, copyeditors may be expected to identify, to list, and sometimes to code unusual *entities*—characters with diacritics (accents used in languages other than English), non-Latin characters and alphabets, symbols, and glyphs that are not available on a standard QWERTY keyboard.

In the days of pencil editing, this task was often referred to as typencoding, a term that persists in some production workflows. Copyeditors working on hard copy used to identify elements by writing mnemonic codes in the left margin of the manuscript; they listed entities in a special section of the style sheet for the designer's and typesetter's attention. Editors working on-screen today either verify and correct the publisher's provisional markup of elements in the files as they work or identify the elements themselves by inserting generic codes or applying styles defined in the word processor's template. They may also be expected to code entities or to rekey them correctly in *Unicode*, an international character encoding standard, in addition to listing them on the style sheet for the production staff.

WHAT COPYEDITORS DO NOT DO

Given that there is no consensus about how to spell *copyediting*,¹⁰ it is not surprising that the meaning of the term is somewhat unsettled. In traditional print production, copyediting, the last editorial step before typesetting, once clearly referred to the set of responsibilities outlined above. It was usually differentiated from *line editing*, improvements in literary style at the sentence and paragraph levels. (The organization Editors Canada still differentiates such crafting, which it calls *stylistic editing*.) But many US publishers today conflate mechanical and line editing under the rubric of copyediting.

The Chicago Manual of Style prefers the term *manuscript editing*. As described by *Chicago*, manuscript editing encompasses any or all of the tasks along a continuum from simple mechanical corrections (*mechanical editing*) through sentence-level interventions (line, or stylistic, editing) to substantial remedial work on literary style and clarity, disorganized passages, baggy prose, muddled tables and figures, and the like (*substantive editing*). Several professional associations of editors further describe this continuum of manuscript editing in terms of *levels of editing* and characterize the degrees of intervention as light, medium, and heavy copyediting (see the next section, "Levels of Copyediting").

10. The closed forms *copyedit*, *copyeditor*, and *copyediting* are used in *The Chicago Manual of Style* and in most book publishing, but newspapers are apt to employ *copy editors* who *copy edit*. *WIT* prefers *copy editor* (recognizing *copyeditor* as a variant) and *copy-edit*. *M-W Collegiate* shows *copy editor* and *copyedit*, whereas *AHD* recognizes the open and closed noun and verb forms as equal variants.

In the world beyond traditional book and journal publishing, the term *copyediting* is sometimes applied to an even more expansive range of tasks, or the work is incorrectly referred to as *proofreading* by authors despite their lofty expectations of the services to be provided. This is particularly the case among self-publishing authors who hire editorial professionals but who may be unfamiliar with the functional distinctions among types of editing and different editorial tasks. Besides performing the conventional copyediting duties described in this book, an editor in these nontraditional publishing environments may be expected to assess the suitability of a manuscript for publication (usually the role of an acquisitions editor or literary agent); to midwife content, evaluate and reshape a manuscript, or overhaul organization and literary style (the work of a developmental or substantive editor); or to provide other additional services, such as

- fact-checking (verifying factual details)
- art editing (finding or developing illustrations to accompany the text)
- permissions editing (researching and securing rights to use copyrighted content)
- project or production editing (managing the production process: hiring and supervising production specialists, scheduling and tracking progress, overseeing the production budget, maintaining quality standards, and facilitating communication among the members of a production team)
- design (determining the document's physical appearance)
- formatting (preparing files for print and e-book production)
- proofreading (ensuring that the approved final copy is correctly rendered in type)
- indexing
- distributing and marketing the final product

In addition to copyediting, editorial freelancers may supply some of these (and other) services that were once offered by traditional publishers, especially if their clientele includes indie authors. But all these tasks involve discrete skills and command different pay rates; none are included in a copyeditor's duties. Staff manuscript editors, too, often shoulder additional responsibilities and may have to develop editorial and production skills beyond those required for conventional copyediting.

For clarity's sake, therefore, the following distinctions are worth preserving:

Copyeditors are not proofreaders. Although many copyeditors are good proofreaders, and all copyeditors are expected to catch typographical errors, copyediting and proofreading are two different functions. Copyeditors work on an author's manuscript and are concerned with imposing mechanical consistency; correlating parts; correcting infelicities of grammar, usage, and diction; querying internal inconsistencies and structural or organizational problems; flagging content requiring permission; and tagging or styling elements. Proofreaders, in contrast, are charged with correcting errors introduced during the typesetting, formatting, or file conversion of the final document; with

emending deficient page layout; and with identifying any serious errors that were not caught during copyediting.¹¹

Copyeditors are not rewriters or ghostwriters. Although copyeditors are generally expected to make simple revisions to smooth awkward passages, they do not have license to rewrite a text line by line, nor do they prepare material on an author's behalf. Making wholesale revisions is sometimes called *substantive editing* (the "heavy" end of the manuscript editing continuum defined by *Chicago*) or, if the work involves significant engagement with the subject matter, *content editing*. Creating original content to be published under another person's name is called *ghostwriting*.

Copyeditors are not developmental editors. Copyeditors are expected to query structural and organizational problems, but they are not expected to fix these problems. Helping an author develop an idea into a publishable manuscript, overhauling a rough draft, identifying gaps in subject coverage, devising strategies for more effective communication of the content, and creating features to enhance the final product and make it more competitive in the marketplace—these tasks describe *developmental editing*.

Copyeditors are not publication designers. Copyeditors are expected to point out any item in the manuscript that may cause difficulties during production, for example, a table that seems too wide to fit on a typeset page or an entity that may not display properly in a digital environment. But they are not responsible for making decisions about the physical appearance of the publication. All physical specifications—typefaces, layout, the formatting of tables, the typographical treatment of titles and headings, and so on—are set by the publication's designer or by someone wearing the designer's (not the copyeditor's) hat.

LEVELS OF COPYEDITING

If time and money were not issues, copyeditors could linger over each sentence and paragraph in a manuscript until they were wholly satisfied with its clarity, coherency, consistency, and correctness—even with its beauty and elegance. But since time and money are always considerations, many book and corporate publishers let copyeditors know how to focus and prioritize their efforts by using a *levels-of-edit* scheme. In determining how much and what kind of copyediting to request for a given project, the publisher generally weighs such criteria as

the quality of the author's writing
the intended audience

11. Some publishers skip formal copyediting, typeset the raw manuscript, and hire a "proofreader" to correct the most egregious errors and inconsistencies in proofs. But this is just deferred copyediting at a lower pay rate. Other publishers skip the conventional word-by-word proofreading stage when a manuscript has been typeset directly from copyedited files. The author is usually sent a set of proofs and encouraged to read them carefully, but at the publishing firm the proofs are simply spot-checked for gross formatting errors.

the schedule and budget for editing and publication
 the author's reputation, attitude toward editing, and work schedule
 the size of the print run or the public visibility of the electronic document
 the importance of the publication to the publisher's core mission
 the publisher's standards

In the best of all possible worlds, decisions about the level of copyediting would be based solely on an assessment of the quality of the writing and the needs of the intended audience. But in many cases, financial considerations and deadline pressures win out: "This manuscript is poorly written, but our budget allows for only light copyediting" or "This manuscript would benefit from a heavier hand, but the author has many pressing commitments and won't have time to read through a heavily edited manuscript, so let's go for light editing."

Many book and corporate publishers use a light-medium-heavy grid to describe the kinds of problems the editor should resolve, those the editor may ignore, and those the editor should prompt the author to address. There are no universal definitions for light, medium, and heavy copyediting, but you won't be too far off target if you follow the guidelines presented in table 1. You could even show these guidelines to your editorial coordinator and ask which statements best match the expectations for your work.

Some corporate publishers use an FIQ checklist, which itemizes problems to fix (F), ignore (I), or query (Q) and is keyed to either the audience or the type of publication. The sample entries in table 2 apply this scheme to corporate reports prepared with four different target audiences in mind: in-house readers, low-visibility clients, high-visibility clients, and the general public. Still another levels-of-edit scheme (table 3) prioritizes the copyeditor's efforts on the basis of the stage of a corporate document's editorial review: early draft, final draft, and final copy.¹²

In determining the desired level of editing, you should also assess the overall project by considering the following issues:

Audience

- Who is the primary audience for this text? How will this audience affect your choices regarding tone, level of diction, and sentence length? (Today, for example, copyeditors must sometimes accommodate a *global* audience, one that may include readers with limited English proficiency, lack of familiarity with Anglo-American references, and particular cultural sensitivities.)
- How much are readers expected to know about the subject?
- Will readers use the publication for pleasure or for professional development? Is it a reference guide or a skim-once-and-throw-away document? Will most users read the piece straight through, from start to finish, or will they consult sections of it from time to time?

12. The schemes described in tables 2 and 3 are based on Amy Einsohn, "Levels of Edit: Scalpel, Weed-Whacker, or Machete?," unpublished manuscript; a version of this essay was published without these tables in *Editorial Eye* 27, no. 4 (April 2004), pp. 5–6.

TABLE 1. Levels of Copyediting: Light-Medium-Heavy Grid

	Light Copyediting	Medium Copyediting	Heavy Copyediting
Mechanical editing	Ensure consistency in all mechanical matters—spelling, capitalization, punctuation, hyphenation, abbreviations, format of lists, etc. Optional guideline: Allow deviations from house style if the author consistently uses acceptable variants.		
Correlating parts	Check contents page against chapters; check numbering of footnotes or endnotes, tables, and figures. Check alphabetization of bibliography or reference list; read footnote, endnote, or in-text citations against bibliography or reference list.		
Language editing	Correct all indisputable errors in grammar, syntax, and usage, but ignore any locution that is not an outright error. Point out paragraphs that seem egregiously wordy or convoluted, but do not revise. Ignore minor patches of wordiness, imprecise wording, and jargon. Ask for clarification of terms likely to be new to readers.	Correct all errors in grammar, syntax, and usage. Point out or revise any infelicities. Point out any patches that seem wordy or convoluted, and supply suggested revisions. Ask for or supply definitions of terms likely to be new to readers.	Correct all errors and infelicities in grammar, syntax, and usage. Rewrite any wordy or convoluted patches. Ask for or supply definitions of terms likely to be new to readers.
Content editing	Query factual inconsistencies and any statements that seem incorrect.	Query any facts that seem incorrect. Use standard online and printed references to verify content. Query faulty organization and gaps in logic.	Verify and revise any facts that are incorrect. Query or fix faulty organization and gaps in logic.
Permissions	Note any text, tables, or illustrations that may require permission to reprint.		
Markup	Mark up all elements.		

TABLE 2. Levels of Copyediting: FIQ Checklist

	In-house	LowViz Client	HighViz Client	Public
Contact information	F	F	F	F
Gender-specific language	I	I	Q	Q
Grammar errors, glaring	F	F	F	F
Grammar errors, minor	I	I	F	F
Passive voice, overuse of	I	I	Q	Q
Pricing data	F	F	F	F
Wordiness	I	I	Q	F

Note: F = fix; I = ignore; Q = query

TABLE 3. Levels of Copyediting: Stages of Editorial Review

	Early Drafts (content edit)	Final Draft (deep edit)	Final Copy (proof-edit)
Audience, suitability for	■	□	
Organization and coherence	■	□	
Pacing	□	■	
Wordiness, diction		■	
Punctuation		■	□
Grammar and spelling		■	■
Executive summary		■	■

■ = principal emphasis □ = secondary emphasis (blank) = ignore

Text

- How difficult is the text? Is it a simple narrative? genre or young adult fiction? academic, scientific, technical, or professional writing with scholarly apparatus? text written by a nonnative speaker of English?
- How long is the text? Length is now generally expressed as a total word count, including any notes and nontext apparatus, but it was once based on a count of double-spaced 8½-by-11-inch manuscript pages typed in 12-point Courier with one-inch margins all around. Some editors still convert the total word count into equivalent manuscript pages of 250 words for

purposes of estimating required editing time and fees. Regardless of how many words an author has crammed on to each page, what matters in determining length is the word count, which cannot be manipulated by changing the font or line spacing.

- What physical form is the text in?

For hard-copy editing: Although editors rarely mark paper manuscripts these days, some exceptions persist, such as photocopies of old magazine articles assembled for a book-length collection of essays, or tear sheets from a work being revised for a new edition. If you must work on hard copy, consider the following: Is the space between lines of text generous enough to accommodate interlinear markings? (Single-spaced typing and tightly spaced lines of print are difficult to copyedit unless only a sprinkling of commas is required.) How many words are on a page? How legible is the font? Are all four margins at least one inch?¹³

For on-screen editing: What word processing or other computer program did the author use? Has any additional file preparation been done? Has the publisher performed any setup or *file cleanup* routines, or is the copyeditor expected to

convert the author's files into another program or format
pull apart (or combine) the author's original document files
remove embedded tables and illustrations from the text and place them in separate files
convert foot-of-page notes to end-of-document notes (or vice versa)
provide markup or styling of manuscript elements, such as headings, lists, and block quotations
remove multiple tabs, extra line and word spaces, and other aberrant formatting
clean up nonstandard keyboarding of special typographic characters (e.g., non-Latin alphabets and ideograms, diacritics, symbols, quotation marks, dashes, and ellipses)
execute other preliminary search-and-replace operations

- How will the copyedited manuscript be processed?

For hard-copy editing: Will the entire document be rekeyed, or will someone be keying only the changes into existing production files? (If the latter, the copyeditor must use a brightly colored pencil or pen for marking, so that the inputter can easily spot all the changes.)

13. Some publishers may rekey the hard copy or scan the printed text, using *optical character recognition* (OCR) technology, to create a digital file *prior* to editing so the copyeditor can work on-screen. This intermediate step is likely to produce a less costly and more accurate publication in the end.

For on-screen editing: Is the copyeditor to supply *redlined files* (i.e., files that show insertions and deletions), clean files (i.e., files that contain only the final edited version of the text), or both? Is the copyeditor expected to code elements or special characters (e.g., letters that carry diacritic marks, non-Latin alphabets)? perform other file cleanup operations?

- Does the manuscript contain material other than straightforward running text (e.g., tables, footnotes or endnotes, bibliography, photos, graphs)? how much of each kind?
- Are there legible reference copies of all art, supplied as low-resolution digital images, thumbnails, or photocopies?

Type of editing

- Has the person assigning the job read the entire manuscript or skimmed only parts of it?
- How many hours or dollars have been budgeted for the copyediting?
- Is the copyeditor expected to substantially cut the text?
- Is the copyeditor expected to check the math in the tables? to verify direct quotations or bibliographical citations? to test URLs?
- Are there any important design constraints or preferences: limits on the amount of art, size of tables, number of heading levels? use of special characters (non-Latin alphabets, math symbols, musical notation)? footnotes or endnotes?

Editorial style

- What is the preferred style manual? the preferred dictionary?
- Is there an in-house style guide, tipsheet, or checklist of editorial preferences? (A sample Checklist of Editorial Preferences is provided in an appendix to this book.)
- Are there earlier editions or comparable texts that should be consulted? Is this piece part of a series?

Author

- Who is the author? Is the author a novice or a veteran writer?
- Has the author seen a sample edit?
- Has the author been told what kind of (or level of) editing to expect?

Administrative details

- Is the copyeditor to work directly with the author, designer, or typesetter? Or will these relationships be mediated by an editorial coordinator?
- To whom should the copyeditor direct questions that arise during editing?
- What is the deadline for completion of the editing? How firm is it?