

Quick Reference Card – Technical Editing

Roles and responsibilities of a technical editor:

A technical editor is the reader's advocate, ensuring the product is understandable, ethical, and enables readers to act.

The levels of editing

- **Comprehensive editing:** typically at the start of the process and involves large-scale editing (organization and design) for content, usability, and effectiveness.
- **Copyediting:** takes place throughout the process and involves a review to ensure accuracy and consistency of grammar and visual design; also ensures correct spelling, punctuation, grammar, and template and style application.
- **Proofreading:** takes place when the document changes versions and serves as a quality assurance check; also ensures author made the changes recommended for the previous version(s).

The editor's functions

- **Text editing:** review and revise prepared text based on consistency, correctness (grammar and content), completeness, usability, understandability, and appropriateness.
- **Preparing the document for publication:** review and revise the design elements of a document, including type, layout, use of visuals, and template application.

The editor's skills

- **Audience expert:** understands how the audience absorbs, responds to, and acts on information; can apply this knowledge to the document (e.g., accounts for demographics, localizes the document, accounts for differences in knowledge-level between the writer (expert) and the audience (potentially non-expert)).
- **Communication expert:** can apply varied communication strategies to relay technical information to a broad audience; understands how and when to use visuals, how to structure information, how to present convincing arguments.
- **Language expert:** understands rules of grammar, usage, and style, and adapts to regional/industry variations and organization-specific style guides.

Design guidelines

Readers use the document by **creating their own meaning and reading selectively**. Accommodate these habits.

Design Principles

Design includes content, organization, and style, as well as visual design (page layout, type, display of information, headings, structural and visual signals, and navigation).

Good design:

- is subordinate to meaning and use
- enables comprehension
- improves usability
- motivates readers to read and use the document

Types of information

Content – ensure the information you wish to convey:

- Anticipates readers' questions
- Links new with familiar information
- Is organized

Signals – use signals to assist in interpretation of content:

- Verbal signals – words/sentences that indicate structure/relationships
- Structural signals – indicates the hierarchy of ideas
- Visual signals – visual elements that indicate structure/relationships (e.g., indentations, bullets, graphs, etc.)

Noise – avoid signals that impede the interpretation of content:

- Spelling, grammar and consistency errors
- Irrelevant information and inappropriate voice
- Inaccurate structures
- Too many visuals

Style guidelines

Style is the **cumulative effect of choices relating to wording** that create a writer's persona and affect comprehension.

Situation

Consider **readers' situations** when making decisions about style:

- Origins and impact (problem and solution)
- Readers and use (prior knowledge, storage, etc.)
- Culture and expectations (social values, language, etc.);
- Accessibility (visual and other impairments)
- Constraints on development and production (budget, etc.)

Grammar

Common **grammatical mistakes** to watch for:

- Subject-verb agreement
- Faulty predication
- Dangling modifier
- Misplaced Modifier
- Pronoun-antecedent agreement error
- Ambiguous pronoun referent
- Pronoun case error
- Tense error
- Tense sequence error

Sentences

Sentence structure:

- Place the main idea of the sentence in the structural core
- Use subordinate structures for subordinate ideas
- Use parallel structure for parallel forms

Sentence arrangement:

- Place the subject and verb near the beginning of the sentence
- Arrange sentences for end focus and cohesion
- Prefer subject-verb-object/complement word order

Sentence length and energy:

- Adjust sentence length to increase readability
- Use people as agents when possible
- Prefer positive constructions

Verbs:

- Build sentences around action verbs
- Choose strong verbs
- Avoid nominalizations
- Prefer the active voice

Nouns:

- Use concrete, accurate nouns
- Prefer single words to phrases or pairs
- Prefer simple to complex words

Annotation Symbols – quick reference

Insertion marks

- delete
- delete a the word
- to ^{insert} something
- colons; semicolons; commas; and periods
- the apostrophe's neat
- [parentheses] and [brackets]
- hyphen related
- em-dashes and en-dashes
- equals "is the same as"
- #> insert vertical space
- insert a space
- close up
- close up vertical space

Type and spacing

- italicize
- roman
- boldface
- no underline
- H20 and πR2
- new paragraph. Then new line
- run together; do not break
- flush left. Or right.
- centre
- ragged right
- align all of these lines together
- Indent one em.
- Indent two ems.
- Indent all of this two ems.

Miscellaneous

- transpose letters words or
- capitalize James
- small caps for a.m.
- DON'T abuse CAPS
- Spell out 2HP
- nevermind

When **copyediting**, place these marks directly on the text. When **proofreading**, place marks in the text *as well as* in the margins.

These marks are for copyediting. Proofreading marks are very similar – see page 192-193 in *Technical Editing* (fifth edition) by Rude and Eaton for reference.