



FREELANCE EDITING 101

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LESSON #4

Three Methods of Editing

I would categorize proofreading/editing methods into three types:

1. Hard copy (pages sent by mail)
2. Electronic editing (files sent by email)
3. Indirect editing (such as websites or published books)

Hard-Copy Editing

Although hard-copy editing isn't often done these days, some clients will send you printed material (such as a full or partial manuscript) to edit or proofread. If you're working for a publishing house, they may send you the "galleys," which are printed pages that reflect what the published book will look like, with the exception of any mistakes the proofreader finds.

You'll want to follow your client's specific requests, of course. But in general, hard-copy edits use proofreading symbols. *The Chicago Manual of Style* has a list of standard proofreaders' symbols (Figure 2.6) (<https://www.chicagomanualofstyle.org/help-tools/proofreading-marks.html>) as well as a sample marked-up page (Figure 2.7). If you are a subscriber to *CMOS* online, see <https://www.chicagomanualofstyle.org/dam/cmofstyle/figures/pdfs/chi-cms2017-fig-2-6.pdf> for proofreading symbols.

If you're working for a publisher, use a colored pencil (unless otherwise instructed). If others have proofread the manuscript before you, use a different color than what has been used by others. Make sure it's light enough to be easily erased (you *will* make mistakes from time to time) but dark enough to be read.

Place a caret (^) in the document wherever a change is needed, and place the appropriate proofreading mark in the right margin of that line. Here's an example. The caret would go between the two *t*'s in "outto."

Original line: Sheryl's husband took her outto dinner.

With proofreading mark: Sheryl's husband took her outto dinner. #
^

If more than one change is needed in a single line, separate the proofreading marks in the margin with a slash. (The carets should be between the two *t*'s in "outto" and at the end of the sentence, after "dinner.")

Original line: Sheryl's husband took her outto dinner

With proofreading marks: Sheryl's husband took her outto dinner # / ©
^ ^

If a change is needed twice in a row, rather than repeat the symbol in the margin, just write another slash. Here's an example. (The carets should be between the *w* and the *s* in "ws" and before the "nd.")

Original line: It ws the best of times nd the worst of times.

With proofreading marks: It ws the best of times nd the worst of times. a //
^ ^

Except for obvious typos, you must look up every punctuation change you mark in *The Chicago Manual of Style* and every spelling change in *Merriam-Webster's Collegiate Dictionary* (the most recent editions). You'll need to make a notation in the margin—either the *CMOS* rule number or "M-W 11" (to indicate that you found the correct spelling in the 11th edition of *Merriam-Webster's Collegiate*)—just to the right of the suggested change. Here's an example. (The carets should be after "husband" and after "Mark." Also note, the comma in the right margin should have a caret over it; I couldn't find a symbol for that.)

Original line: Sheryl's husband Mark took her out to dinner.

With proofreading marks: Sheryl's husband Mark took her out to dinner. , // (CMOS 6.31)
^ ^

If explanations are required, or you have questions about the document, either write your questions at the bottom of the page or on a sticky note, depending on the publisher's preference (and the length of your comment).

If you're working for an individual, he or she may not know what the standard proofreading symbols mean. Therefore, you should either attach a copy of your own proofreading symbols page (replacing the marks on the attached page with your own in any cases where your marks don't look exactly like the ones on the page) or include an explanation in the text (at least the first two or three times you use each symbol). Marks should be made where the changes are required, rather than having a row of unfamiliar symbols and explanations along the right margin. Additional comments may be made in the margins and/or between the lines (which are, hopefully, double-spaced).

Unless a client (such as a publishing house) requests something specific, you may use either a colored pencil or a pen. I don't like using red ink; it tends to make people feel like they're in high school and the English teacher is marking every mistake on their homework. I also recommend not using black ink, as that can be easily missed with black print. Blue works well. My favorite is green ink, as that color is warm and friendly.

The edited hard copy is mailed to the client, who then makes changes in his or her document as he or she deems appropriate.

This process requires that the client print the document (which costs the client paper, toner, and wear and tear on the printer), pay for postage and an envelope to mail it to you (and include a self-addressed stamped return envelope [SASE], if you requested), wait for the mail to get to you and back, then try to read your handwriting and comprehend your symbols, and then implement the changes into his or her computer file manually.

To save time and money, most clients prefer electronic editing.

Electronic Editing

If a client wants to email you something to edit, decide if you will allow attachments. Some people are concerned about viruses. However, if you only open attachments that you know are from clients, you should be safe. I've been doing it for years with no problem. Just be careful what you open. And make sure you have a good virus protection program on your computer.

If a client sends you something to edit via email, you can either read it on screen or print it out and then transfer your edits to the computer file. Printing it out means you pay for ink, paper, and wear and tear on your printer. So unless your client specifically asks you to do this, you're probably better off not doing so. (If the client does request it, you may want to charge for your printing costs.) However, if you find that you edit better with printed pages than on screen, this may be a good option for you.

Some email servers have problems with large attachments or multiple ones. If a client says he or she sent you something and you didn't get it, request that the chapters be sent separately or maybe up to three chapters per email. Your return edits could have the same problem. Another option is to use WinZip (or a similar program), which "zips" multiple files into one compact file that the client can "unzip" on his end. Or use Dropbox to save large files in the "cloud" and send the link to the files to your client.

If a client wants to send you something via email, find out what word processing program he or she is using. Microsoft Word has become the standard, but some people may use WordPerfect, and you may occasionally come across someone who has only Microsoft Works (discontinued in 2007). If you can't open a client's attachment, find out if he or she is using a PC or a Mac. If there's a compatibility issue, you may ask clients to save their files in the format you have or in Rich Text Format.

Word 2007 and later default to saving files with a .docx extension. If you have an earlier version of Word, you may not be able to open such files. You may be able to download a conversion program (I believe you can get it free from Microsoft's website; other places will charge). But

the conversion programs don't guarantee that formatting will be translated properly. The best option is to have the client save his or her files with a .doc extension. Word 2007 will convert properly, with all formatting intact.

Track Changes

When a client wants to send you something to edit via email, find out if he or she is familiar with Track Changes (TC). This feature is the greatest thing for editing since double-spacing! If you've never used it, I highly recommend that you spend some time familiarizing yourself with it. (See Lesson 3 for more info.)

With this feature turned on, every change you make to the document is marked in red (or whatever color the user selects) so the client can see your suggested additions and deletions.

When your clients open the files you've edited with TC, if they place the cursor over one of the changes and right-click, a little menu box will pop up that allows them to "accept" or "reject" that change. To accept or reject multiple changes, they can highlight the changes (making sure the beginning and end of the highlight are both on a change), right-click, then choose "accept" or "reject." To accept all changes made in a document, they can click "accept all changes." (That works with "reject all changes" as well.)

Additional comments may be added in a couple of different ways. The Track Changes feature allows you to insert comments that are "hidden" unless the client turns on the "show comments" option. Comments can be shown either in "balloons" in the right margin or in a box at the bottom of the page, depending on which option the client chooses. If you've got a client who isn't too familiar with TC, you may want to insert comments in brackets within the text (and possibly highlight them) so your comments don't get missed.

After you've edited a file using the TC feature, you may want to save it under a new file name, then turn off the Track Changes feature and select "accept all changes." Then read through the revised document to see if you missed anything. If any additional changes need to be made, make them in both files. If there are lots of changes in a document, I usually send the client both files—the one showing the edits with TC, and the one that has all of my edits incorporated so they can see how it reads.

Without Track Changes

If you or your client is not familiar with Track Changes, you can do electronic editing by using the "strikeout" font for anything you believe should be deleted and making additions and changes and comments using a different-colored font/the "highlight" feature. You may want to use a different color for each type of change—maybe red for corrections, blue for comments, green for additions, for example. You could use a different color of highlighting for different types of suggestions—maybe yellow for words that are overused, green for words that are repeated in close proximity, light blue for inconsistencies, and maybe one of the darker colors for words you think could be taken out to improve flow and/or pace. Keep in mind that this will take extra time. You may want to remind the client of this if he or she is paying per hour. You may lose out if you are charging per word/page.

Indirect Editing

You may not have an actual document, either in print or as an electronic file, to mark up. For example, a client might hire you to edit website content or a book that's already been published. In these cases, you will need to decide with the client the best way to communicate what changes you would recommend. This may be a simple list or a more complex form. However you do it, make as clear as possible the location of each change you suggest.

For example, for a published book, you could identify the page number, the paragraph number, and the line number within that paragraph (or just the page number and the line on the page). If you use paragraph numbers, count any partial paragraphs at the top of the page (continuations from the previous page) as the first paragraph, even if it's only a few words.

For websites, identify the page by name and by URL (the website address specific to that page) then by the location of the change you're recommending. You may even be given backdoor access to make changes directly to the site.

Make Your Edits Clear

Whichever method you use, do your best to make your comments and edits clear. What are you suggesting the client do? Delete something? Add something? Replace one thing with something else? Move something from one place to another? Consider rewording to avoid confusion?

Occasionally, you may want to include an explanation of why you're making a particular recommendation. For clarity? Incorrect usage? Better flow? To avoid redundancy or repetition? You may also want to cite the rule from the appropriate style guide to prove a punctuation point.

[Note from Christi: Also make sure your comments are grammatically correct. Use proper English (not abbreviations or text shortcuts such as "lol") because your comments reflect your editing ability as well as your actual edits. Several editors have taken the substantive and copyediting tests at the [Christian Editor Connection](#), and their comments are filled with grammatical mistakes and misspellings. Double-check your comments!]

Using Style Sheets

I suggest preparing a style sheet as you edit/proofread, noting specific details along the way. Here are some of the things I look for to make sure the author has been consistent throughout:

- Text font and size (This can be a problem, especially if an author copies and pastes things from the internet or other sources.)
- Formats for chapter titles, headings, and subheadings (all caps/initial caps/lowercase, bold, italics, numbered, or bulleted)
- Scripture quotes: what version(s) is used, are they italicized or not, in bold or not, indented or not, block indented or flush left (when they're not in running text). Does the reference come before or after the quote, is it in parentheses or not, are references in parentheses abbreviated or not?

- Are pronouns for deity capitalized? (*The Christian Writer's Manual of Style* suggests *not* capitalizing; however, most publishers will allow author preference here, but this needs to be consistent throughout.)
- Curly quotes and apostrophes or straight ones (smart quotes)? (You'd be surprised how many manuscripts include both . . . especially when the author has copied/pasted material such as Scripture quotations.)
- Does the author use double hyphens for dashes or converted em dashes? (Again, either is okay, but consistency is key.)
- For inclusive numbers and dates, does the author use a hyphen or an en dash?

For fiction manuscripts, you may also want to prepare a character list. It should include the names of every character mentioned in the story (you'd be surprised how many times a character's name will be spelled differently in different parts of the manuscript) and any details you notice about that character—hair color, eye color, height, build, age, birth date, occupation, school attended, make/model/year and color of the car he or she drives, etc. When you notice that detail come up again later in the manuscript, check your style sheet to make sure the author has been consistent.

For fiction manuscripts, you could do a timeline as well. Whenever a specific date, holiday, or important occasion occurs, mark it on the timeline. Make sure the author has seven days in each week, the appropriate number of days in each month, the proper time lapse between Mother's Day and Father's Day, Christmas and New Year's, etc. If a character is walking around outside or in a shopping mall during December, some mention should be made of the holiday sights and sounds. If there's a reference to the weather, make sure it's appropriate for that time of year in that part of the country. If a scene occurs the week before a holiday or special event (such as the character's birthday) and the next scene occurs after that date, the author should be encouraged to either show that important event happening, summarize the event, or explain why the event was not worth describing (in the POV character's perspective, of course).

Check to see if the author has developed character sketches and a timeline/scene list. If so, ask for them. Having them will save you a lot of time and work.

If the author has done something mostly one way but occasionally another way (for example, curly quotes are used most of the time but there are a few straight ones here and there, or pronouns for deity are sometimes capitalized and other times not, or a character's name is spelled one way most of the time but once or twice has a different spelling), the editor/proofreader should correct the infrequent occurrences to match the most commonly used format or spelling.

If an author has used two different conventions pretty much equally (for example, some multiple-verse Scripture references have hyphens and some use the en dash), the editor can point this out to the client and suggest that he or she decides what he or she wants to do and do it consistently throughout. If there are several of these things, the editor could send the client a copy of his or her style sheet, character list, and/or timeline, or may suggest that the client create these lists. If you notice several discrepancies early on in the manuscript, you could send the client a blank style sheet, character list, and/or timeline and recommend that he or she fill it out and use it to check the manuscript for consistency. (The PEN Institute is adding a new course in 2022 on creating and using style sheets.)

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LESSON #4 ASSIGNMENTS

To receive a Certificate of Completion, you must do either assignments #1 and #3 or #2 and #3.

For each editing assignment, be sure to use the industry-standard guidelines for a book manuscript.

Assignment #1

Copy and paste both of the following paragraphs into your word processor, turn on the Track Changes feature, and edit the paragraph electronically. Use the Comments feature to make some notes to this virtual client. Feel free to do either a basic proofread or an in-depth edit. Save the document and upload it to the forum (Google Group).

Paragraph #1

When I was around seven or 8 years old, my Mom and Dad took my brother and I to a little Beach on the Hudson river where they kept a small rowboat. One warm day while they sat upon a huge flat rock talking to one another, my brother followed me as I walked towards the rowboat. It was anchored about a foot-and-a-half from the shoreline in front of the rock my parents were sitting on. Jimmy and I wore a tee shirt, cutoffs, sneakers and I had my longish brown hair pulled up into a high pony tail that sat securely on the top of my head.

Paragraph #2

They called him Saul. He would imprison Christians at will. That was until He met the master on the road to Damascus in Acts Chapter 9. When that happened, everything changed. He began to example the life of Christ in such a way that the jewish leaders became incensed. To stop this they threw him in prison in Jerusalem and then in Phillipi. In fact, the religious leaders wanted him not only imprisoned, but they wanted him dead. So they started plots against him. In one raucous rumble, Lyceus a Roman commander broke it up and put Paul, who was once called Saul, under arrest just to keep him in protective custody - away from the Jewish leaders that wanted his death. He was then transferred to Cesarea by the Mediteranean Sea. He stayed there for two years waiting for a fair trial with the Governor. Well, he finally got it. But when he did, he said "I appeal to Caesar" because Paul was a Roman citizen. When he did, the governor said: "To Caesar you shall go.

Assignment #2

Copy and paste one (or both) of the above paragraphs into a file, convert to double-spacing, print it out, and proofread or edit using the symbols in the attached lists. (If you happen to have a scanner, you could scan your edited page and send it to me. If not, this will just be for your practice.)

Assignment #3

Come up with a template for a style sheet, character list, and/or timeline that you can utilize with your clients' manuscripts.