

CHAPTER 3

Identifying editorial tasks and skills

3.1 INTRODUCTION

All editors work to ensure the most effective communication between the author and the readers of a text. However, the editorial role is difficult to define and delimit, as editors perform various functions in different contexts. In addition to this, the term “editor” is often used to describe a job that in reality has nothing to do with actual text or language editing. For example, in many publishing houses the job title “managing editor” is used to describe the person in charge of the management of the editorial department. Managing editors are usually responsible for a number of activities, such as human-resource management, project management, strategic planning and budgeting. However, the actual editing of texts is often not part of their job description. A distinction between the various functions fulfilled by editors is therefore necessary, as this study focuses on only those editors who fulfil editing, reviewing and amending functions.

Mossop (2007:26), quoting the National Occupational Classification published by Canada’s employment ministry, provides the following broad description of what editors do:

Editors review, evaluate and edit manuscripts, articles, news reports and other material for publication or broadcast, and co-ordinate the activities of writers, journalists and other staff. They are employed by publishing firms, magazines, journals, newspapers, radio and television networks and stations, and by companies and government departments that produce publications such as newsletters, handbooks and manuals. Editors may also work on a freelance basis. [In addition they may] specialize in a particular subject area, such as news, sports or features, or in a particular type of publication, such as books, magazines, newspapers or manuals.

The diversified nature of the editing industry, evident from the above comment, means that editors may fulfil an array of functions and work in a variety of contexts. Furthermore, the actual process of editing can also be categorised into various types, dimensions or levels that reflect the different aspects of the text that receive editorial attention (e.g. structure, style, content or language) and the degree of editorial intervention (e.g. substantive or superficial) (see Section 3.2 for a more detailed discussion of this).

As discussed in Chapter 2 of this study, the development of standards for the South African editing industry will contribute directly to the regulation and professionalisation of the industry.

However, standards development needs to be based on extensive research and consultation, involving the various sectors of the industry. This chapter thus focuses on the various tasks and skills associated with editing in the different sectors of the industry. In Section 3.2 the various types, dimensions or levels of editing, as outlined in standard industry textbooks, are discussed, with the aim of creating a basic framework from within which to approach the delineation of tasks and skills. Section 3.3 seeks to identify the specific tasks and skills associated with the various sectors of the industry. Each sector of the industry is discussed individually and the tasks and skills specific to each sector, as outlined in the relevant literature, are identified. In Section 3.4 the tasks and skills discussed in each sector are consolidated into a comprehensive table of all possible tasks and skills associated with editing across the various sectors. The tasks and skills in this table form the basis of the items for the survey used in the empirical investigation (see Chapters 4 and 5). The aim of this chapter is thus to identify and categorise the tasks and skills associated with editing for the various sectors of the editing industry.

3.2 EDITORIAL TASKS AND SKILLS

For standards to be developed, specific tasks and skills need to be identified, differentiated and categorised. Parameters for this differentiation and categorisation need to be established prior to the identification and classification of tasks and skills. This section thus seeks firstly to identify a set of parameters for the classification of tasks and skills, by analysing the types, levels and dimensions of editing outlined in various widely used editing textbooks. To facilitate the discussion, a distinction is, in the first instance, made between the textual and extra-textual dimension of editing. The textual dimension of editing relates to the various types or degrees of textual intervention that editors take responsibility for, while the extra-textual dimension of editing is defined as those non-linguistic skills that editors need in order to perform their work effectively and efficiently. These dimensions of editing apply throughout the industry sectors in various permutations and to various degrees.

3.2.1 Textual tasks for editors: types and levels of editing

Most editing textbooks distinguish various types, levels or degrees of editing and/or copyediting (see Mackenzie, 2004; Butcher *et al.*, 2006; Einsohn, 2006; Mossop, 2007). These books categorise the various types of editing by outlining what each type of editorial work involves. Mossop (2007) and Mackenzie (2004) distinguish various types of editing in the broader sense, while Einsohn (2006) and Butcher *et al.* (2006) focus on copyediting, but also identify other types of editing that do not form part of copyediting.

Mackenzie (2004) discusses various types of editing in reference to the Australian Standards for Editing Practice (ASEP). Mackenzie (2004:138) identifies three main types of editing (although she does indicate that there is some overlap between these types of editing): copyediting; language editing; and substantive editing. She defines copyediting as the heart of the editorial process, consisting of tasks that are done to prepare a document for publication (Mackenzie, 2004:138). In line with this definition, Mackenzie (2004:138-143) lists twelve steps in the copyediting process:

- Appraisal
- Mark-up or apply styles
- Rough Edit of text
- Rough Edit of everything else
- Smooth Edit of everything
- Compile queries for the author
- Documentation, extra copy
- Incorporate author corrections
- Final check all
- The printout
- Proofing
- Dispatch or handover

Mackenzie (2004:140) refers to the “Rough Edit” as a very fast, initial type of edit where the aim is to find all problems, solve anything controversial and query or note everything else. Furthermore, Mackenzie (2004:140) states that during the “Rough Edit” the editor fixes all the obvious errors (or errors that can be solved quickly). During the “Smooth Edit”, the editor reads the text for sense, and focuses on language editing, inconsistencies and contradictions in the argument. Copyediting therefore involves a number of processes or steps, comprising various tasks. These tasks range from marking-up or coding the document for the typesetter to editing and fixing spelling, grammar and punctuation, and querying any problems, contradictions, inconsistencies and inaccuracies in the text. In addition to this, Mackenzie (2004:141) also states that copyeditors concentrate on sense by correcting any inconsistencies and contradictions in the argument. Copyeditors are also involved in the final stages of production and play an important role in the proofing stage by either proofreading the proofs themselves or approving any changes made by the proofreader.

Language editing is another important type of editing and comprises three levels or degrees: light, medium and extreme. According to Mackenzie (2004:144), the level of language editing done is determined by the quality of the writing as well as the budget.

Mackenzie (2004:144) further clarifies this by stating that when conducting a language edit the following questions should be asked about each sentence:

- Is this sentence needed?
- Does it belong in this paragraph, under this heading, in this chapter?
- Does it follow logically from the one before?
- Is it precise and succinct? Is it well-written and grammatically correct?
- Is its content probably accurate?
- Does its content need to be supported by referencing?
- Does the sentence contain any specialist terms that need to be explained, either in the text or in a footnote or a glossary?
- Does it contradict statements made elsewhere in the book?
- Is it consistent in terminology and style (spelling, capitals, hyphens) with the rest of the book?
- Does it contain any cross-references (to another chapter, a table, an illustration) that need to be checked? Or should a cross-reference be added?

This type of editing therefore requires the editor to ensure that the language of the text is relevant, logical, accurate, coherent, accessible and consistent with the principles of style.

Mackenzie (2004:148) defines substantive editing as “tailoring the structure, content, language and style of a publication so that the intended reader will find it attractive because it is clear, interesting, memorable, logical and easy to understand”. Furthermore, Mackenzie (2004:58) states that when conducting a substantive edit the editor should engage the content, expression and structure of the text by analysing the structure, organising and grading the headings, rearranging the text, imposing a structure or rearranging the structure, and changing the presentation of the content.

While Mackenzie (2004:148) does make a distinction between the three types of editing, she also indicates that there is significant overlap, as evident in the following comment: “Copyediting can take place at various levels, depending on the quality of the original document and the time and money available. It includes language editing and it blurs into substantive editing” (Mackenzie, 2004:138). It therefore appears that for Mackenzie (2004), the three types of editing are not necessarily distinct in terms of the aspects of the text that they give attention to, but rather reflect differences in the degree to which particular aspects of the text are engaged in the editorial process.

Butcher *et al.* (2006:1-2) discuss four aspects of editing: substantive editing; detailed editing for sense; checking for consistency; and ensuring clear presentation of the material for the

typesetter. Butcher *et al.* (2006:2) state that copyediting involves detailed editing for sense, checking for consistency and ensuring that the material for the typesetter is presented clearly, while substantive editing does not form part of the copyediting process. The aim of substantive editing is to improve the text by making amendments to its content, scope, length, level and organisation, and as such it is considered intensive and large-scale work because it focuses on improving the overall presentation of the text (Butcher *et al.*, 2006:1). Detailed editing for sense is micro-scale editing and focuses on improving the meaning of the text, requiring the editor to check and make amendments to aspects such as diction, punctuation and abbreviations, and to ensure that the meaning of the text is logical and uniform (Butcher *et al.*, 2006:1). Checking for consistency involves ensuring that the text is consistent in terms of its style, referencing, cross-referencing, numbering and bibliographical style, while ensuring that the material is presented clearly for the typesetter involves checking that editorial changes are clearly marked for the typesetter (Butcher *et al.*, 2006:2). Copyediting is therefore viewed as editorial work that ensures that the text is in line with pre-set rules, that the meaning is clear and logical, that the text is consistent in terms of style and the treatment of various textual features, and that these changes are clearly marked.

Einsohn (2006:5-10) identifies six principal tasks for copyeditors: mechanical editing; correlating parts; language editing; permissions; typesetting; and content editing.

- Mechanical editing ensures consistency in all mechanical matters, such as spelling, capitalisation, punctuation, hyphenation, abbreviations and format of lists (Einsohn, 2006:12).
- Correlating parts involves cross-checking parts of the text, such as the content pages against chapters, numbering of footnotes and endnotes, tables and figures, alphabetisation of the bibliography or reference list, and reading the footnote, endnote, or in-text citations against the bibliography (Einsohn, 2006:12).
- Language editing involves checking the grammar, punctuation, syntax and usage of the text, and editing or revising wordy or convoluted paragraphs (Einsohn, 2006:12).
- When checking for permissions, the editor must note all material requiring permission, and remind the author to obtain permission to print any text, tables, or illustrations that may still be under copyright, or have already appeared in print (Einsohn, 2006:10).
- Typesetting occurs when copyeditors are asked to typeset or mark up all the parts of the text that are not regular running text (Einsohn, 2006:11).
- Content editing usually requires the editor to bring any errors, discrepancies or inconsistencies in content and organisation or structure to the author's attention. Sometimes a copyeditor may be asked to resolve these problems as part of a

substantive edit or rewrite, but generally the copyeditor's responsibility for the correctness of content is limited to querying (Einsohn, 2006:9).

Although Einsohn (2006) focuses specifically on copyediting, she also indicates other types of editing that do not, in her view, form part of the copyeditor's job. These types of editing are proofreading, substantive or content editing, developmental editing, and publication design (Einsohn, 2006:11). Unlike copyeditors, substantive editors make "wholesale revisions to the text", while developmental editors are expected to "reorganise and restructure the text" (Einsohn, 2006:11). As discussed above, Einsohn (2006:9) does, however, point out that copyeditors are responsible for querying or calling the author's attention to any inconsistencies or discrepancies in content as well as any structural and organisational problems. This means that copyeditors do not correct these issues, but rather query them.

Mossop (2007:27-28) distinguishes four broad types of amending work that an editor can do: copyediting; stylistic editing; structural editing; and content editing. Copyediting involves correcting a text and bringing it into conformance with specific rules, and is considered micro-level work as the editor checks and amends the smaller details of the text (Mossop, 2007:37). Furthermore, Mossop (2007:37) specifies that this type of editing involves amending the text according to grammatical rules and guidelines for generally accepted usage (e.g. correct spelling, syntax, punctuation and idiomatic usage) together with the specifications of the house style.

Stylistic editing involves two processes: amending the language of the text to suit the readers, and creating a smooth-flowing text by correcting and improving, for example, inappropriate sentence connections, wordiness and incorrect focus in sentences (Mossop, 2007:60). The aim of stylistic editing is therefore to ensure that a text is appropriate and accessible for the reader, specifically with regard to word choice, sentence construction and the kind of textual "flow" created by the appropriate use of cohesive devices in the text.

The aim of structural editing is to amend the structure of the text to ensure optimum and logical presentation of the content. Mossop (2007:74) says that structural editing involves the physical structure (e.g. title, summary, section heads, paragraph sequence and tables) and the conceptual structure (e.g. presentation of problem, tentative solution, arguments for, arguments against, and conclusion) of the text. The aim of structural editing is to optimise the physical structure of the text to ensure that conceptually the text is logical and easy to follow (Mossop, 2007:74).

Lastly, content editing relates to amending the content of the text by ensuring that it is factually sound, checking that there are no mathematical or logical errors, and suggesting additions to or subtractions from the coverage of the topic, if necessary (Mossop, 2007:28). This kind of editing may also require the editor to write or rewrite portions of the text, and therefore implies that good writing skills are important for this type of editing.

In addition to the various types of editing outlined above, proofreading is another important type of editorial work frequently referred to in the literature. In the very first instance, the distinction between proofreading and editing lies in the fact that proofreading occurs at a different stage in the publishing process. According to Ritter (2003:42), “the commonly held distinction between editing and proofreading is that editors work on typescripts before they are typeset, the resulting proofs being worked on in turn by proofreaders”. Tarutz (1992:6) confirms this and states that proofreaders compare typeset copy to the original manuscript in order to mark any discrepancies or possible mechanical errors for the author and/or editor. Einsohn (2006:11) reiterates this by stating that proofreaders “are charged with correcting errors introduced during the typesetting, formatting, or file conversion of the final document and with identifying any serious errors that were not caught during copyediting”. Proofreading forms an important part of the publishing process, because once manuscripts have been typeset, any errors in the text are costly to amend (Butcher *et al.*, 2006:95). This is because, as Ritter (2003:55) points out, “changing so much as a comma might require resetting the whole line in which it occurs, and frequently resetting several lines or an entire paragraph”.

According to Mackenzie (2004:124):

Proofreading is vital for quality control, but the proofreader’s responsibility is narrower than the editor’s: it is to verify that the edited manuscript has been faithfully rendered in type according to specifications. The proofreader does not interrogate substance and structure as the editor does, but concentrates on seeing that the editor’s and designer’s instructions have been carried out.

While there is therefore a distinction between the role of the editor and that of the proofreader, many editors, depending on the sector they work in, are expected to fulfil some proofreading functions, suggesting that editors, in general, are required to have some proofreading skills. This is evidenced by the fact that many editing textbooks (such as Tarutz, 1992; Mackenzie, 2004; Butcher *et al.*, 2006; and Einsohn, 2006) mention the skills associated with proofreading, suggesting that proofreading skills may be important for some editors. In addition, Lee (2004:107) says that every person who works in the publishing industry or who is involved in the publishing process should learn proofreading marks and how to use them.

Anderson (2006:ix) points out that proofreading “calls for technical knowledge of both language and print, both inherent and acquired, for reading”. Proofreading involves a careful and concise read of the proof to ensure that all the editor’s and author’s corrections are brought into the proof and that layout requirements have been met. While these are the primary responsibilities involved in proofreading, proofreaders do check for major substantive errors and any errors of fact, sense, grammar and consistency that may remain (Mackenzie, 2004:124). However, as pointed out above, any degree of substantive editing is not the responsibility of the proofreader.

The various kinds, levels and degrees of editing discussed in this section essentially focus on the same kinds of textual tasks, although authors conceptualise the classification of these tasks somewhat differently. For the sake of clarity and ease of categorisation, it was decided to follow the categorisation proposed by Mossop (2007), with the addition of a category for proofreading, in this study. Mossop’s (2007) typology of editing has the advantage of categorising textual tasks as they relate to specific, fairly clearly delineated elements or aspects of the text, instead of utilising a less clearly defined continuum of interrelated types of editing (as, for example, Mackenzie, 2004 does), or broader, less clearly defined categories of editing (such as in, for example, Butcher *et al.*, 2006). For the purposes of this study, the following five categories of textual tasks involved in editing are therefore distinguished:

- copyediting, which involves micro-level editing tasks that ensure that a text is correct in terms of pre-determined rules (generally accepted rules of grammar, spelling, punctuation, syntax, style and usage), that these rules are applied consistently throughout, and that parts of the text are clearly correlated to each other,
- stylistic editing, which involves ensuring that the words, sentences, paragraphs and text are appropriate for the reader and that the text flows and is logical,
- structural editing, which aims to ensure that the structural elements of a text are logically presented and sequenced, and that the text is easy to follow and conceptually sound,
- content editing, which aims to ensure that the content of the text is correct and appropriate, and which includes tasks ranging from correcting minor factual errors to writing or suggesting rewrites for portions of the text, and
- proofreading, which involves ensuring that the page proofs of a text incorporate all editorial changes, that the proofs conform to layout specifications, and that no other errors remain.

3.2.2 Extra-textual skills for editing: skills and types of knowledge for editors

In addition to the skills required to perform the textual tasks involved in editing, editors also need to possess certain extra-textual skills, traits and knowledge. Some of these appear to be universally associated with the editorial role, while others are more closely associated with the various sectors and contexts in which editors work.

In the first instance, a distinction should be made between the skills associated with in-house and freelance editing. Editors who work in-house are generally not required to have business, financial, and extensive administrative management skills. For freelancers, however, these skills are pivotal. Liebenberg (2008:14) says that freelancers are “on their own...and have to be aware that they are responsible for everything they do”. Liebenberg (2008:14) also points out that freelancers’ responsibilities include “ensuring that backup systems are in place, obtaining resources on an ongoing basis, checking and doing quality control, sending out invoices, checking expenditure, complying with statutory obligations like taxes, and so on”. Furthermore, freelancers need to establish procedures for practice (whereas most in-house editors’ employers will have these procedures in place), draw up contracts, track payments, manage workflow, and market themselves. While some of these skills are also required of in-house editors (such as ensuring backup systems are in place, obtaining resources and checking and doing quality control), freelancers need more business, managerial, administrative and marketing skills, as they are essentially running their own business.

The difference in the working context of freelance and in-house editors suggests that, depending on their working context, most editors must have good project-management and administrative skills. Linked to this is knowledge of how the industry works and the procedures for publication. These skills are important because editors play an important role within the publishing process, and should therefore understand what their part in the process is, as well as the contributions of various other role-players.

Another important extra-textual skill for editors is knowledge of the role that technology plays within the publishing process. This is particularly important, especially considering the recent advances in publishing and word-processing technology (see, for example, Ritter, 2003; Lee, 2004; Mackenzie, 2004; Butcher *et al.*, 2006; Einsohn, 2006). Given the recent advances in technology, it is becoming increasingly important for editors to be able to work on hardcopy as well as on line, suggesting that skills in correctly marking changes on electronic copy and knowledge of the various methods of querying are becoming indispensable for editors.

In addition to the technical and procedural skills outlined above, editors also need to possess a number of personal and interpersonal skills. Brooks *et al.*, (2005:36) define a good editor as someone who has highly developed writing skills; knowledge of graphics processes and typefaces; a good general knowledge; an understanding of legal, ethical and taste considerations; interpersonal skills; a strong sense of responsibility; and a good understanding of the publication and its audience. Similarly, Mackenzie (2004:1-2) states that editors need to possess a number of personal qualities (some of which include communication skills, perseverance and attention to detail, social skills and imagination and initiative).

Specialised knowledge is also vital for editors, since they need to be experts in linguistic principles and linguistic subdisciplines (Du Plessis and Carstens, 2000). In addition, editors must ensure that the text is appropriate and attractive for the reader, suggesting that knowledge of text types, structures, design and layout are important. Knowledge of specialised subject matter is also important, because the content-editing function suggests that editors must be familiar with a text's content and subject matter.

All of the above suggest that editors require more than just the ability to correct language, grammar, usage and the overall appearance and flow of a text. In addition to textual tasks, editors also need to demonstrate certain skills and knowledge that may be either directly or indirectly related to actual textual tasks. From the discussion in this section, it is clear that editors need to have technical skills, personal and interpersonal skills, good procedural skills, as well as specialised knowledge.

3.2.3 Parameters for the categorisation of tasks and skills

Based on the discussion in Section 3.2.1 and 3.2.2, a set of parameters for the categorisation of tasks and skills has been formulated. Table 3.1 provides a definition of the various categories of editorial tasks and skills which will be used throughout in this study.

	CATEGORY	CATEGORY DEFINITION
TEXTUAL TASKS	Copyediting	Copyediting refers to the type of editing that brings a text into conformance with pre-set rules (generally recognised grammar and spelling rules, rules of good usage, and house style) (Mossop, 2007:27). Copyeditors ensure consistency in matters such as terminology and the positioning, numbering and appearance of various headings, illustrations, tables, lists, etc. (Mossop, 2007:27), and also pay attention to and/or correct the correlating parts of the text such as cross-references, footnotes and endnotes, contents lists, etc. (Einsohn, 2006:12).
	Stylistic editing	Stylistic editing aims to tailor the vocabulary and sentence structure to the readership of the text (Mossop, 2007:28), and to create a smooth-flowing text by fixing problems such as poor inter-sentence connections, wrong focus within sentences, confusing verbosity, and awkward sentence structures (Mossop, 2007:60).
	Structural editing	Structural editing involves reorganising the physical and conceptual structure of the text to achieve a better presentation of the material, or to help the reader by signalling the relationships among the parts of the message (Mossop, 2007:28).
	Content editing	Content editing involves checking the content of the text for accuracy and logic. During content editing, the editor may suggest additions to or subtractions from the coverage of the text. Content editing involves macro-level editing (suggesting major changes to the coverage of a document's topic) and micro-level editing (correcting factual, mathematical and logical errors) (Mossop, 2007:28).
	Proofreading	Proofreading aims to verify that the edited manuscript has been correctly rendered in type according to the editor and author's specifications (Mackenzie, 2004:124). Proofreading therefore involves correcting errors introduced during the typesetting, formatting or file conversion of the final document and identifying any errors that were not caught during the editing process (Einsohn, 2006:11).
EXTRA-TEXTUAL SKILLS	Technical skills	Technical skills refer to those extra-textual skills that editors need in order to work efficiently. Technical skills include management skills, computer- and publishing-software literacy and good sourcing skills.

Personal and interpersonal skills	Personal and interpersonal skills refer to specific character traits and personal qualities that editors need in order to work efficiently in different environments. This category also includes the skills required to work effectively individually or in a team.
Procedural skills	Procedural skills aid editors in understanding and making decisions during the publishing and editing process. Procedural skills include (amongst others) knowledge of the publishing process, the people central to it and their functions.
Specialised knowledge	Specialised knowledge refers to the knowledge required to complete an edit successfully within the specific sector. Specialised knowledge includes knowledge of the differences and similarities between the various sectors of the industry; specialised subject matter (whether it be technical, academic, legal, medical etc.); and various text types and text structures.

Table 3.1: Categories of tasks and skills for editors

The outline provided above is based on a literature survey utilising general textbooks on editing. However, as has already been pointed out, there is a great deal of variation in the actual tasks performed by editors in various sectors in the industry. The following section therefore focuses on the tasks and skills specifically associated with editing in particular sectors of the industry, using Table 3.1 to categorise these particular tasks and skills in a systematic way. The ultimate aim of this is to create a comprehensive list of all possible tasks and skills that editors in all sectors of the industry may possibly be asked to perform or demonstrate. This list will form the basis of the survey component of this study.

3.3 CONTEXTS AND SECTORS OF THE SOUTH AFRICAN EDITING INDUSTRY

Law and Kruger (2008:490) suggest that before standards for editing can be produced one needs to be able to provide accurate and comprehensive definitions of what all the different types of editing as practised in various contexts entail. This is important, as editors working in one sector of the industry may not necessarily subscribe to particular practices from other subsectors. For example, editors working in the book-publishing sector may be required to make substantial changes to the content of the text (and very often write or rewrite portions of the text). This is something that academic editors who work with dissertations and theses do not do, particularly given the ethical considerations associated with working on academic texts.

For the purposes of this study, four industry sectors have been identified: editing for book publishing, editing for the mass media, technical editing and academic editing. Editors working in the book-publishing sector are employed by book-publishing houses and work preeminently

on manuscripts and books. There are three main market segments in the South African book-publishing sector, namely: academic, educational and trade (PASA, 2008). The mass-media sector of the industry comprises texts that are published to mass audiences. In this sector, the focus is on printed media, such as newspapers, magazines and online media. The technical-editing sector is the broadest of the four sectors, and unlike the book-publishing and mass-media sectors, is defined based on the subject matter of the documents and texts worked on. More specifically, the subject matter of technical texts is specialised in terms of content, including documents published within the public and private sectors (such as governmental documents, corporate business documents, instruction manuals). Academic editors work predominantly on texts that are produced from within the institutions of academe, with the intent to further research and scholarship (such as academic or scientific articles, papers and studies for publication, conference presentations, and dissertations and theses). There are two main areas of focus in the academic-editing sector: editors who are employed by journals on either a freelance or an in-house basis; and academic editors who edit dissertations and theses. In each of the four sectors, editors may work in-house, or may be freelancers contracted to do particular jobs. It is important to point out that these sectors are not always clearly distinguishable, and there may be some overlaps. For example, educational book-editing shares some similarities with academic editing. Nevertheless, to facilitate the discussion, the sectors will each be discussed individually, with any overlaps indicated as such.

3.3.1 Editing for book publishing

According to the Publishers' Association of South Africa (PASA), the South African book-publishing industry has three main market segments: academic, education and trade. The education segment of the publishing industry is the biggest in the country, followed by the trade and academic segments, respectively. According to Galloway *et al.* (2009:17) the percentage of total book sales (both imported and local) contributed by each of these segments in 2007 were the following: the education segment contributed 53.73% to total book sales, the trade segment 28.26% and the academic segment 17.65%.

These segments each have a specific focus in the market. The academic book-publishing segment publishes books and learning materials for the post-school tertiary market, and includes the publication of tertiary textbooks, learning guides, study guides and theory-based books.¹ Educational book-publishing is aimed at the school market (from pre-school to Grade 12), and includes school textbooks, learning guides, teaching guides, and support materials,

¹ It should be noted that there is some degree of overlap between the types of texts edited in the academic book-publishing sector and the academic-editing sector.

while trade publishing refers to all other types of books available for the public to purchase, such as trade fiction and non-fiction (PASA, 2008).

In each of the segments outlined above, there are two main categories of editorial staff responsible for preparing books for publication: editors or copyeditors (who are mostly involved at the manuscript stage), and proofreaders (who are mostly responsible for checking proofs during the proof stage). In a number of countries (such as the USA and Britain), a distinction is made between the roles of the editor and the copyeditor (see, for example, Lee, 2004). According to Yager and Yager (2005:153) the editor is responsible for specific projects and works with the author and literary agent from the idea-stage of a book through its proposal, presenting the proposal to the editorial committee, negotiating with the author and literary agent, and coordinating the delivery of the manuscript and the production stages. The copyeditor is responsible for editing the manuscript for spelling and grammatical errors, and checking for consistency (Yager & Yager, 2005:161). The South African book-publishing industry is slightly different as the same person normally performs the functions outlined above. This person will be referred to as the “editor” in the discussion of this sector of the industry.

With regard to copyediting specifically, Butcher *et al.* (2006:432-452) state that editors need to check the manuscript for the following:

- General
 - Completeness and organisation
 - Legibility, ambiguous characters, special sorts
 - Numbered and lettered paragraphs
 - Breaks in text where no subheading
 - Design specification
 - Copyright
 - Author’s argument
- House style
 - Abbreviations
 - Bias and parochialisms
 - Capitalization
 - Cross-references
 - Dates
 - Italic
 - Numbers, units, etc.
 - Punctuation
 - Spelling
- Preliminary pages
 - Half-title

- Series page
- Frontispiece
- Title page
- Verso of title page
- Dedication and epigraph
- All lists
- Contents list
- List(s) of illustrations
- List of tables
- List of contributors
- Preface
- Acknowledgements
- List of abbreviations
- Other preliminary matter
- Running heads
- Subheadings
- Footnotes and endnotes
- Tables
- Numbered or unnumbered lists
- Other tabulated material
- Appendixes
- Glossary
- Index
- Bibliographical references
 - References in text
 - References in notes
 - Bibliography or list of references
- Illustrations
 - Captions
 - All diagrams
 - Maps
 - Graphs
 - Halftones.

The list outlined above suggests that copyediting is an essential step in the book-editing process, and that book editors should focus on ensuring that the text is in line with pre-determined rules of spelling, grammar and punctuation, and that each element in the text is consistent with rules of style. In addition, Einsohn (2006:14-15) outlines the following questions that all book editors should ask before beginning an edit:

- Audience
 - Who is the primary audience for this text?
 - How much are readers expected to know about the subject?
 - How will the readers “use” the publication?
- Text
 - How long is the text?
 - What physical form is the text in?
 - How will the copyedited manuscript be processed?
 - Does the manuscript contain material other than straight running text (e.g. tables, footnotes or endnotes, bibliography, photos, graphs)? How many of each kind?
 - Are there legible photocopies of all art?
- Type of editing
 - What level of copyediting is being requested: light, medium or heavy?
 - Is that request based on scheduling or budget constraints?
 - Has the person making the request 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 math in the tables? To verify bibliographical citations?
 - Are there any important design constraints or preferences?
- Editorial style
 - What is the preferred style manual? The preferred dictionary?
 - Is there an in-house style guide, tipsheet, or checklist of editorial preferences?
 - Are there earlier editions of 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
 - To whom should the copyeditor direct questions that arise during editing?
 - What is the deadline for completion of the editing? How firm is it?

Clearly, book editors are responsible for more than the language in a text. From the list above, it appears that in their work book editors need to be particularly sensitive to the needs of the target reader (in terms of both language and knowledge) as well as the needs of the author. In addition, the book editor needs to be cognisant of the publisher's or client's stylistic preferences, as well as the time and money budgeted for the project. The editor works closely with the commissioning editor, author, typesetter, artists, graphic designer, proofreaders and all the other people working in the editorial department.

According to PASA (2008), the editor is the person who most closely engages the content, style and structure of the manuscript. In book publishing, the editor aims to improve the “overall coverage of and presentation of the piece of writing, its content, scope, length, level and organisation... and may rewrite and rearrange the material [and] suggest better illustrations” (Butcher *et al.*, 2006:1). This suggests that book editors also ensure that the text is structurally sound and that the material is presented in a logical and clear way. In addition, book editors are expected to ensure that the content of the text is accurate, complete and appropriate, and that the style of writing suits the reader and the use that the reader will make of the book.

In this process, the editor works closely with the author and suggests and/or makes changes and amendments to the content and structure of the manuscript. Structural- and content-editing tasks therefore form part of the work of the book editor. In addition to this, the editor fulfils a copyediting function and checks the manuscript for spelling, grammar, usage, diction, style, formatting, illustrations, layout, permissions, libel and bias. Furthermore, the editor might also be responsible for commissioning and checking certain pictures or illustrations, and ultimately has to ensure that the manuscript is ready for print.

In addition to the responsibilities outlined above, book editors require knowledge linked to the particular segment of the book-publishing industry in which they work. For example, editors working in the trade segment of the industry need to understand the readership and the use of the book. Stainton (2002:19) points out that trade books “generally should be self-explanatory and should not require readers to have information beyond what appears in the book itself”. This means that the editors of such books need to be on the lookout for problems with content, and should ensure that the text is tailored to the target reader and his/her assumed knowledge. Furthermore, editors of fiction trade books “in addition to a knowledge of basics, need to appreciate the author’s aims; in this kind of editing there is room for intuition and for a sense of what the writer is trying to say” (Stainton, 2002:19).

Editors working in the field of educational book-publishing need to be particularly sensitive to the needs of the readers of the text. Most of the books they edit will be used in a learning environment, and therefore the information contained in the text needs to be presented in a way that is conducive to learning. This skill is also relevant for editors working in the academic segment, as the books published in this sector are intended to be used for specific research, academic and training purposes. Editors working in the educational and (sometimes) academic segment will also need to be aware of the requirements of Outcomes-Based Education (OBE) and the policy documents of the Department of Education, such as the Revised National Curriculum Statement (DOE, 2001), as editors are often required to check whether texts are in line with these requirements. Furthermore, the presentation of information contained in this type

of publication is particularly important in South Africa, since most academic and educational books are published in either English or Afrikaans, either of which is a second language for the majority of South African readers. This is reiterated by the statistics presented in PASA's 2007 Annual Book Publishing Industry Survey Report (Galloway *et al.*, 2009). According to Galloway *et al.* (2009:45) the net turnover for local book sales in the education segment of the industry in 2007 showed that 74.93% of total net sales that year were English, while the sale of Afrikaans education books accounted for 11.96% of total sales. The total net sales of the academic segment in the same year reflect a similar distribution, with English book sales totalling 90.11% and Afrikaans book sales totalling 9.89% (Galloway *et al.*, 2009:46).

All of the above means that in addition to skills directly related to the textual aspects of editing (copyediting, stylistic editing, structural editing and content editing), editors also need to have some specialised knowledge of the type of book they are editing (educational, academic or trade) as well as the content and the use of the book for the readers. Furthermore, editors working in the book-publishing industry need to have knowledge of the publishing process and the various stages that a manuscript goes through until it is finally published, as this impacts on the level or amount of editing to be done and the time allocated for editing (in the context of the various stages of production). This is important because editors need to keep to deadlines and have to work within the budgetary constraints of the specific project. This, of course, also suggests that editors need to have good planning and management skills. In addition to this, book-editors also need to possess hardcopy- and electronic-editing skills. This is important, particularly given the advances in publishing technology (see, for example, Lee, 2004; Mackenzie, 2004; Butcher *et al.*, 2006). All of this implies that book editors need to possess a number of extra-textual skills that guide them through the editing process. Procedural skills, specialised knowledge, technical skills and personal and interpersonal skills are therefore of key importance.

Once a manuscript has been edited and typeset, the proofing stage begins. According to Butcher *et al.* (2006:3-4) the editor "may read a proof or collate the author's proof with the proofreader's, ensuring that the author's amendments are comprehensible and consistent with the existing material, and that they can be incorporated without great difficulty or expense". This means that the editor needs to be able to understand and evaluate the author's and proofreader's changes. In addition, the editor needs to ensure that these changes are presented clearly for the typesetter, following accepted hard-copy proofreading conventions. Knowledge of proofreading marks and correctly making changes on hard copy are clearly important for book editors. It also suggests that editors need to be aware of the various stages of the publishing process, and the cost and time constraints associated with each project. Organisational and management skills are therefore of importance. Butcher *et al.* (2006:1) reiterate this: "Common

to all types of publication and all methods of production is the value that a good [editor] can add to an author's work by ensuring that, within the inevitable budgetary and time constraints, the work is presented to its readership in the best possible form."

As discussed above, there is generally a clear distinction between the work of an editor and the work of a proofreader. However, it is important for editors to understand the role of the proofreader, since the proofreader makes an important contribution to the publishing process. Broadly speaking, proofreaders are responsible for checking page proofs for any errors missed during the editing and typesetting stages, before the book goes to print. According to PASA (2008), proofreaders check final proofs for errors, typos, inconsistencies, misspellings and omissions that might have been introduced during the production process or missed by the copyeditor, as well as double-checking page and cross-references. In addition, proofreaders check proofs against the author's and editor's changes and mark any changes that were missed by the typesetter. In the context of book publishing in South Africa, the proofreading function is often fulfilled by an editor, although at bigger publishing houses specialist proofreaders may be appointed or contracted to fulfil this function. For this reason (and the various other reasons outlined above), it is important for editors to possess some proofreading skills, and at the very least be able to understand proofreading marks.

Overall, the discussion in this section has demonstrated that editors working in the book-publishing sector need to be able to perform a number of textual-editing tasks (such as copyediting, stylistic editing, structural editing and content editing). Copyediting and stylistic editing appear to be of particular importance for book editors; however, for some book editors (such as those working in the educational-publishing segment) content editing and structural editing are also equally important. In addition, the discussion above has demonstrated that proofreading (or an understanding of the proofreading stage of production) is an important component of some editors' work. Strongly linked to the textual tasks performed by editors, is the ability to demonstrate certain skills and abilities, such as project management, personal and interpersonal skills, specialised knowledge and technical skills.

3.3.2 Editing for the mass media

Some of the skills that editors working for magazines and newspapers require are quite different from the skills required in the other sectors of the industry. The main reason for these differences is that magazines and newspapers fall into the category of mass media, which are published frequently and targeted at a mass audience. Editing for newspapers and editing for magazines of course also differ. Magazines have fewer and longer deadlines than newspapers because they have a lower frequency of publication (weekly, fortnightly, monthly, quarterly,

biannually and annually). Magazines generally contain longer and better-written articles that tend to be more featurish (in that they deal more with “soft news” and stories), personal and opinionated than newspaper articles. Also, the readers of a magazine are usually clearly specified in terms of the expectations of the content (Brooks *et al.*, 2005:321-322). Editors working at newspapers have more deadlines and faster turnaround times, as newspapers are published more frequently than magazines. The articles in newspapers are shorter, more factual and not personal in style and tone. Furthermore, newspapers generally publish for a broader market (even though some might be aimed at a more specific market), whereas magazines are generally targeted at a very well defined niche market. Editors working for a newspaper therefore have less time to edit, less room for error and a less specific readership to edit the text for. While editing for these two forms of media are essentially part of the same sector, because of the differences outlined above each will be analysed individually in the following discussion.

The nature of magazine publishing and the format of magazines mean that editors working in this sector of the industry need to have skills that extend significantly beyond language editing, and include knowledge of the publishing process, design and management. Morrish (2003:16) reiterates this: “[E]ditors have learned to become involved in the publishing process, rather than simply offering editorial services... Now they must contribute to the commercial well-being of their magazines as well as their editorial quality.”

According to Yager and Yager (2005:86-90) three people at a magazine fulfil editing functions: the copyeditor (or subeditor), the online editor, and the proofreader. According to McKay (2000:256), the copyeditor is responsible for checking, editing, fitting and presenting the copy on the page, while the proofreader checks the proofs for any errors that were missed by the copyeditor. The online editor is responsible for the magazine’s website, and edits, sources and creates articles and online texts to be used on the website.

The role of the copyeditor varies from magazine to magazine, and therefore the literature demonstrates some variation in opinion about the tasks of copyeditors at magazines. According to Morrish (2003:177) copyediting for a magazine has three strands: *quality control*, where the copyeditor ensures that everything is accurate, well written and legally safe; *production*, where the copyeditor ensures that everything fits and that deadlines are kept; and *projection*, where the copyeditor ensures that everything is presented to maximum effect, through headlines, standfirsts and captions. This suggests that a magazine copyeditor’s role includes copyediting, stylistic editing, some structural editing and content editing. In contrast to this, Evans (2004:340) defines the role of the copyeditor at a magazine as “paragraph-, sentence-, or word-level editing in which an editor checks for grammar, spelling, punctuation, good transitions, and stylistic details,” but points out that “copy editors are not charged with evaluating the quality of a

manuscript as a whole". Clearly, Evans views the magazine copyeditor's role as purely linguistic, suggesting that magazine copyeditors focus on two levels or types of editing: copyediting and stylistic editing. According to Daly *et al.* (1997:64), the copyeditor reads the copy closely, correcting errors in spelling, grammar and usage, and making certain it conforms to the magazine's particular style. The copyeditor also checks for consistency and ensures that the elements on the page are correct and in the right position. This suggests that Daly *et al.* (1997) view the magazine copyeditor's role as primarily involving copyediting tasks. While each of these definitions of the responsibilities of a magazine copyeditor differs subtly, two levels or types of editing emerge as vital for magazine copyeditors: copyediting and stylistic editing. Copyeditors working at magazines therefore ensure that the text is linguistically sound, is consistent, and adheres to house style; and that the language and the text as a whole are specifically focused on the needs and expectations of the target reader.

In addition to correcting the mechanical aspects of a text, copyeditors working at a magazine need to have a broad set of skills that relate to the various other responsibilities associated with copyediting. McKay (2000) discusses a number of responsibilities that are central to a magazine copyeditor's job. These responsibilities include fitting the copy; editing, selecting and cropping illustrations; liaising with the various role-players (such as designers, writers, etc.); checking the functional points in the text and ensuring that the text conforms the magazine's house style; verifying facts and ensuring that there are no potential legal problems with the text; and checking and correcting the verbal signposts in the text (McKay, 2000:122-129). Evidently magazine copyeditors are also sometimes responsible for content editing and structural editing. These responsibilities also imply certain extra-textual skills. For example, for an editor to fit the copy to the page successfully, he/she needs to understand the basic construction of a particular kind of story, the basic principles of layout, and the software used in magazine publishing. Only with this background knowledge can he/she decide on the most appropriate and effective way of shortening a text without sacrificing its meaning, appeal or impact.

From a textual-editing perspective, magazine copyeditors therefore need to edit the text in such a way that it represents the readers' interest at linguistic level, and need to ensure that the piece is constructed for clarity, logic, interest, accuracy and coherence (Morrish, 2003:178). Furthermore, copyeditors often have to make substantial cuts in submitted articles or carry out major rewrites (Morrish, 2003:179). Magazine copyeditors therefore need well-developed writing skills, as well as the kind of interpersonal and communication skills needed to justify rewrites to the author, if required. Knowledge of design is also key, as the editor needs to work closely with the designer when laying out the pages. In fact, at some magazines the copyeditor might be responsible for the layout as well as copyediting (Morrish, 2003:180). Furthermore, copyeditors

working at a magazine need to be knowledgeable about the production process and the copy flow, as they have to set and meet deadlines.

The copyeditor or subeditor² is the one person at a newspaper who is responsible for performing the editing function. According to Yager and Yager (2005:15) the subeditor makes sure the news and photographs are ready to go to print by ensuring that each story and photo is cropped and edited in order to provide the most compelling, complete, timely and accurate news content possible for the newspaper. In addition, Nel (2005:27) points out that subeditors are specialists who polish the story and “check verifiable facts, including the spelling of names and addresses, watch for legal infringements, write headlines and lay out pages”. Unlike editors in most of the other sectors of the industry, newspaper editors work under an immense amount of pressure to meet deadlines, because newspapers are published more frequently than any other kind of printed text. In addition, subeditors work with a number of short articles that will form part of one publication, each article differing in content. These realities play an important role in the skills required to perform the job: newspaper subeditors need to be experienced and confident enough to make quick, informed decisions, and must also be able to shift their attention between different topics and content.

According to Friend *et al.* (2005:51):

Subeditors are concerned with the things large and small that determine the integrity and appeal of the news report. They help the audience access and understand news quickly and easily. They ensure that the news is reported in a fair and accurate fashion. And they make certain that what is written and published reflects standards of consistency and reliability.

In order for subeditors to make the text as accessible and accurate as possible, they need to consider a number of textual aspects. According to Friend *et al.* (2005:53-4) subeditors should read for meaning, organisation and focus, accuracy, grammar, spelling, punctuation, style, language and sentence structure. This suggests that copyediting, stylistic editing and content editing are of key importance for the subeditor's work. Brooks *et al.* (2005:49) elaborate this point by stating that newspaper subeditors should make sure that the writing is reader-centred, readable and right. This is achieved by asking the following of the text: Is the story focused on what the audience wants and needs? Did the writer make the story new for the reader? Is the story clear? Is the story concise? Is the story accurate, objective, legal, ethical, tasteful and sensitive? Are the mechanics in the story correct? (Brooks *et al.*, 2005:50-54).

² In South Africa, copyeditors who work at newspapers are called subeditors. Therefore the term “subeditor” will be used in any instances where the theory refers to newspaper copyeditors.

This means that subeditors ensure that articles are clear, sensible, focused, organised, and accurate in terms of names, dates and places. Furthermore, subeditors need to understand what type of article the text is (news lead or feature lead) and whether it follows the correct structure for articles.³ Dale and Pilgrim (2005:33) state that feature leads and news leads offer different content because “the shapes and natures of the stories are different”. Subeditors need to be aware of this, as the nature and content of the article will determine the structure. Knowledge of various text types and their structures is therefore of key importance for subeditors.

In addition to editing the language, grammar, style and structure of the text, subeditors need to check and recheck facts, and ensure that the content is complete and that no important information is omitted either accidentally or deliberately. Subeditors need to be experts in language, style, layout, design, audience preferences and media law and must have the ability to recognise stories, photographs, and language that may cause legal problems (Friend *et al.*, 2005:284). Subeditors must have highly developed content-editing skills in order to identify inaccurate, incomplete and potentially libellous and biased content. In addition, subeditors write captions and headlines and therefore require well-developed writing skills and the ability to think creatively.

A further skill expected of subeditors is an understanding of the newspaper’s style and function. Subeditors need to know which types of stories are published in a specific newspaper, how these stories are presented and the preferred style for layout. According to Clear and Weideman (1997:76) “each newspaper strives towards a distinct appearance. Some newspapers prefer a sensational layout with large news photographs, big, bold headlines and contrasting colours and sizes, whereas others may use a more conservative layout”. Subeditors need to be aware of the preferred style of the newspaper and how to implement this style best. To accomplish this, knowledge of design and layout is essential. In addition, subeditors must also be aware of the newspaper’s function, as this will affect how stories are edited. According to Clear and Weideman (1997:77), newspapers have certain distinct functions: “... not only do they inform us of the latest news; they also educate and entertain. These functions are clearly

³ According to Nel (2005:92-92) there are two main structures for articles: the *inverted pyramid* and the *champagne glass*. The *inverted pyramid* arranges the information after the lead from the most important to the least (Nel, 2005:90). This is done because it allows the editor to shorten the article from the end, without sacrificing any important information. The *inverted pyramid* is most commonly used for news leads (Dale & Pilgrim, 2005:34). The *champagne glass* organises the lead sentence according to the traditional inverted pyramid, followed by a chronological account of the action with a strong ending (Nel, 2005:92). Dale and Pilgrim (2005:35) point out that feature stories are less constrained by their construction, and “evolve their own shapes”.

illustrated by the hard news on the front page, the information on the entertainment pages, and educational supplements”.

The work of an online editor is a relatively new development within the publishing industry, but many forms of mass media now have websites dedicated to specific publications. Online media are becoming increasingly popular as these forms of media allow the user to access selected information almost immediately: “The online media combine the depth of newspapers and magazines with the immediacy of radio and television” (Brooks *et al.*, 2005:351). Online editors are employed by magazines and newspapers to create, oversee, maintain and edit articles for the publication's website. According to Yager and Yager (2005:90) these websites usually “offer entire electronic versions of the magazine or newspaper by subscription to teaser sites that encourage people to either buy or subscribe to the printed version”.

Brooks *et al.* (2005:344) state that editing for online media differs from editing for traditional media. Part of the online editor's responsibility is to edit the online articles, archive the current issue on site, create additional original material and select photographs or art to accompany an online article (Yager & Yager, 2005:90). Russial (2004:256) adds to this list by stating that some editors are expected to “code web pages, manage online chats, moderate discussion lists, edit audio and video and optimise them for the web, and interact with online readers”. Furthermore, online editors need to understand how online texts are used and should be aware that “long, unrelieved blocks of text inhibit reading rather than promote it” (Brooks *et al.*, 2005:344). As a result, online articles follow a particular structure where stories are layered and links inserted. According to Brooks *et al.* (2005:345), this form of layering and inserting links allows readers to consume as little or as much of the material as they want. Online editors therefore need to be familiar with online text production and also need to possess highly-developed technical skills. The immediacy with which consumers access these websites means that online editors “constantly face deadlines, and must be skilled in the presentation of news in many formats” (Brooks *et al.*, 2005:350). Furthermore, an online editor assembles and edits various parts of the text (such as the content, design and graphics) and thus needs to be “a jack-of-all-trades... and must be proficient in using computers, a key tool of the craft” (Brooks *et al.*, 2005:345, 350).

From the discussion in this section, it is clear that textual tasks are an important component of the mass-media editor's work. Copyediting and stylistic-editing tasks are very important. In addition, stylistic editing appears to be central to the role of the mass-media editor, since the publication must conform to the target reader's expectations and knowledge. In addition, the actuality of these publications suggests that content editing is an essential part of the mass-media editor's work. Furthermore, the discussion above also demonstrated that mass-media editors work in an environment that requires them to demonstrate certain extra-textual skills.

Most important of these skills appears to be a number of personal and interpersonal skills, as well as good planning and time-management skills. In addition, technical skills are also indispensable for mass-media editors.

3.3.3 Technical editing

The field of technical editing, as defined for the purposes of this study, is probably the broadest sector in the editing industry. Technical editing is not defined based on the channel in which the text will be distributed (as is the case with editing for book publishing and editing for the mass media), but rather on the subject matter of the document.⁴ Samson (1993:5) defines technical editing as the revising of a document that presents material related to science or technology, to make it communicate more effectively. Therefore, technical editors should have expertise in the subject matter of the documents they edit, in addition to proficiency in the usual language skills for editors. The content dimension of editing is therefore of particular importance in technical editing.

Samson (1993:227) states that technical editors normally work with instruction manuals, proposals, reports, newsletters and articles, brochures, fact sheets and capability statements, forms and correspondence. Editing for the civil service may also be regarded as a type of technical editing. Editors working in the civil service edit texts that are produced by government. The National Language Service (NLS, 2008:9) points out that technical editors may also edit the following types of documents:

- Major policy documents
- Acts, Bills, Regulations and Circulars
- Green Papers and White Papers
- Annual and analytical reports
- Discussion and consultation reports
- Sectoral studies and investigations
- Statistical reports
- Government notices
- Advertisements
- Circulars to government departments

⁴ Although the technical-editing sector is the broadest of the four editing sectors, very little literature on the work of technical editors exists, and therefore the discussion of this sector is limited by the availability of literature on this sector.

- Handbooks and manuals for government staff
- Training manuals and material
- Internal newsletters.

Technical editors therefore work with various types of documents, some of which may overlap with the kinds of texts handled in other sectors of the editing industry. For example, a technical editor might be required to edit a university mathematics textbook (which overlaps with the academic book-publishing segment), or might be asked to edit an article for an academic journal that deals with the field of medicine or some other technical subject matter (which overlaps with the academic-editing sector).

The skills required to be a technical editor reflect the content focus of this type of editing. Obviously language-editing skills are essential; however, editors working with technical documents need to be experts in the subject matter of the documents they edit, or at the very least they should know where to source information on the subject matter. For example, editors working in the South African civil service need to be aware of the civil affairs of the country. Technical editors also need to understand the specific structural and stylistic requirements of the documents with which they work. This is demonstrated in the structural and stylistic conventions of an instruction manual. Instruction manuals fulfil an instructional function, and therefore the content needs to be presented in such a way that the target reader can assimilate the information in a logical and step-by-step manner. The editor therefore needs to know who will use the text and how the text will be used, so that he/she can ensure that the information is presented optimally.

Samson (1993:9) distinguishes macro-editing and micro-editing as the two components of the technical editor's tasks. Macro-editing requires the editor to organise and clarify the content, structure and logic of the document. This is done to ensure that the document correctly addresses the audience, the subject matter, and the purpose of the text, and as such requires the editor to be familiar with the type of document being edited, the subject matter and the company or agency who commissioned the document (Samson, 1993:9). Macro-editing is therefore similar to content and structural editing (as defined for the purposes of this study) in that it seeks to improve and/or amend the content, and conceptual and physical structure of the text. These forms of editing are crucially important for the types of documents technical editors work with, particularly in terms of the purposes for which the target reader will use the document. For example, an editor working on an instruction manual will need to ensure that the content and instructions are presented in a clear and logical manner, as misinterpretation may lead to injury, harm or damage. Another example of this level of editing is clear in the potential consequences of poorly edited legal documents (such as contracts). The misinterpretation and

misrepresentation of the content of a legal document could have profound implications, and it is therefore important to ensure that all information is clear, accessible, logical and well structured. Micro-editing involves two levels of editing, which Samson identifies as the “correctness edit” and the “complexity edit”. According to Samson (1993:9), “[during] the correctness edit, editors make the document consistent with standards and correct in sentence structure, grammar, spelling, and punctuation”. This type of edit is more mechanical and similar to copyediting because it involves correcting the text by bringing it into conformance with specific pre-determined rules. The complexity edit requires “editors to make sure that the discussion in the document is presented at an appropriate level of complexity for the audience” (Samson, 1993:9). This type of edit is similar to stylistic editing, as it aims to improve the flow of the text and assist the target reader in understanding the content presented in the text. Micro-editing therefore requires the editor to check the smaller aspects of the text such as grammar, diction, usage, style and facts.

In addition to these editing abilities, Tarutz (1992:15) lists the following extra-textual skills as important for technical editors:

- Time management skills (editors typically juggle several different projects at a time)
- Good judgment and decision-making skills (editors field numerous questions needing immediate answers or decisions)
- Ability to weigh the importance of editorial changes when the writer’s time is limited
- Good eye for page design and layout
- Attention to detail without losing sight of the big picture
- Ability to give constructive criticism diplomatically
- Ability to understand the writer’s point of view when making editorial comments
- Ability to understand technical issues in several projects with limited time available for each
- Ability to deal with frequent interruptions
- Ability to refrain from imposing the editor’s own style on someone else’s creation
- Familiarity with book production (processes and costs).

Samson (1993:24) reiterates the importance of extra-textual skills like these, pointing out that it is estimated that many technical editors spend less than 20 percent of their time actually editing. The remainder of the time they are involved in matters such document design and planning, budgeting, scheduling, supervision and liaison. This suggests that technical editors need skills in project management and coordination, and the communication skills necessary to liaise effectively with the various role-players involved in the production process.

The work of technical editors is similar to the work of editors in the other sectors in that a great deal of importance is placed on copyediting and stylistic editing. Technical texts must adhere to pre-set rules for grammar, spelling and punctuation and must be consistent with regard to the application of these rules. Technical texts must also cater to the style of the target reader, since in many instances, these types of texts are instructional or informative. However, technical editors place a great deal more emphasis on content editing and structural editing. This is particularly important for this sector because of the consequences associated with publishing poorly structured and inaccurate texts. In addition, the content focus of the editorial work in this sector suggests that technical editors need to be experts in a text's subject matter. The importance of extra-textual skills for technical editors is asserted by Samson (1993:24) who states that technical editors spend most of their time on matters such as design, planning, budgeting and liaison. Clearly, project-management skills and personal and interpersonal skills are vital for technical editors.

3.3.4 Academic editing

The field of academic editing deals with texts that are produced from within the institutions of academe with the intent to further research and scholarship. Academic editors work with a number of different kinds of texts, namely academic or scientific articles, book-length studies for publication, conference presentations, and dissertations and theses. There may be some degree of overlap between academic editing, technical editing and editing for academic book publishing, depending on the particular situation. However, it is important to distinguish the various working environments of academic editors.

Academic editors who work with academic and scientific articles may be contracted prior to the submission of an article or may work as in-house or freelance editors for a specific journal. If an editor is contracted prior to submission, all editorial changes will be indicated to the client and it becomes the client's responsibility to either accept or reject the editor's proposed changes. Academic editors who work for journals (on either a freelance or in-house basis) are guided by the publication's style sheet. Academic editors who work on dissertations and theses are normally contracted by clients prior to submission. In this instance, the editor will work through the document and indicate all changes. The manuscript is then returned to the student, who will work through the document and ultimately accept responsibility for the quality of the manuscript. Academic editors who work on book-length studies perform editing tasks similar to academic book-editors and will therefore not be discussed in this section.

Academic editing differs from other fields of editing in terms of the particular constraints placed on the degree of editorial intervention. Because many texts edited by academic editors are

submitted for review or examination, academic editors need to be particularly scrupulous about setting boundaries for the degree of editorial intervention deemed appropriate and ethical in the particular situation. For example, if an academic editor receives a poorly written dissertation or thesis, and edits it substantially (in terms of structure, content and style), the author of the text will receive recognition in the form of a degree that may be regarded as undeserved. These tensions place the editor of academic texts in a rather delicate position, because traditionally editors are responsible for making a text as accessible, readable and coherent as possible. The problems surrounding the work of academic editors therefore centre specifically on the degree of editorial intervention. The issue of clear limits or demarcations for editorial intervention is crucially important for academic editors – they need to have clear guidelines facilitating the extent to which they make amendments to a text. No clear guidelines for South African academic editors currently exist, although some research into the role of editors working on postgraduate dissertations and theses has been conducted (see, for example, Van Aswegen, 2007; Kruger & Bevan-Dye, forthcoming).

The available theoretical material or research on editing academic texts is very limited. However, a number of South African companies and agencies that offer editing services for academic texts, specifically dissertations and theses, have guidelines for such work. For the purposes of the discussion here, the websites of two agencies were consulted: Exactica (www.exactica.co.za), and Technical Editing and Proofreading (www.technical-editing-and-proofreading.com).

Exactica is a South African thesis and dissertation support website. Exactica offers workshops on academic writing and editing, guidelines for writing theses and dissertations, and professional academic copyediting and proofreading services. Professional academic editors who are SATI-accredited edit all dissertations and theses submitted to Exactica. The editing process comprises two steps. During the first edit the editor makes amendments to the document using the *track changes* function. The document is then returned to the client to be reviewed. Once the client has reviewed and either accepted or rejected the changes proposed by the editor, the document is returned to the editor for a final review. According to Exactica (2008), during the first edit the editors:

- make sure all heading levels, captions and paragraph styles are correct and consistent and of DTP standards throughout the document
- ensure that the table of contents is complete, consistent and matches the actual headings and page numbers in the document
- ensure that the spelling is consistent and correct
- check for grammatical errors
- make sure that punctuation is correctly used throughout

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- check and correct the formatting of numbers and units of measure
- check tables in the dissertation for both the layout and totals
- ensure that totals are the same way everywhere they are given
- check the list of abbreviations with the abbreviations in the text
- check and correct references and cross-references
- check the bibliography for consistency and style
- ensure that all references in the text appear in the bibliography
- check the layout of the dissertation against the institution's guidelines
- check the dissertation for logical consistency and flow and make suggestions for improvement.

The editors at Exactica therefore focus on copyediting, and edit the text's style (in the mechanical sense of a style sheet), language and physical structure, and suggest changes where there may be problems with the conceptual structure and content. Exactica appears to take cognisance of the fact that academic texts need to reflect the capabilities of the authors, and therefore editing is constrained by guidelines that do not substantively alter the text.

Technical Editing and Proofreading is also a South African editing agency. Technical Editing and Proofreading specialises in editing all technical and academic documents, such as dissertations, theses and journal articles, maths, science and IT-texts, and business reports and plans. In terms of its academic editing and proofreading services, Technical Editing and Proofreading (2006) do the following:

- general editing and proofreading of the document
- review and correction of spelling, choice of words, grammar, and punctuation
- consistency check in spelling, hyphenation, numerals, fonts and capitalisation
- consistent use of keywords or phrases is checked
- the structure is reviewed and changes proposed
- the content is reviewed for clarity, understandability and general readability; changes are proposed
- the in-text references and bibliography or list of references are checked for conformance to the particular system being used and in-text references are cross-checked against the list of references.

The two agencies therefore include roughly the same tasks in academic editing, which here focus specifically on the editing of dissertations, theses and journal articles. The focus is on copyediting, and any irregularities in the content and the flow of the text are not corrected, but rather brought to the author's attention.

Unlike South African academic editors, academic editors working on dissertations and theses in Australia are guided by a policy document based on the ASEP, which provides clear parameters for editing dissertations and theses. According to the policy, editors should limit their editorial intervention to Standard D (dealing with language and illustrations) and Standard E (dealing with completeness and consistency) of the ASEP (CASE, 2005:1). These standards are listed, in summary as:

D. Language and illustrations

Editors ensure that the building blocks of the publication – the language and illustrations – are suitable for its purpose, taking into consideration the needs of the readership, the author's intention, the available resources and the type of publication. Editing the language and illustrations of a publication requires knowledge of the following matters:

- D1. Clarity
- D2. Voice and tone
- D3. Grammar and usage
- D4. Spelling and punctuation
- D5. Specialised and foreign material
- D6. Illustrations and tables

E. Completeness and consistency

Editors minimise unnecessary distractions for the reader by ensuring that the elements within the publication are complete and consistent. Editing for completeness and consistency requires knowledge of the following matters:

- E1. Integrity
- E2. Tools and procedures
- E3. Text
- E4. Illustrations and tables
- E5. Format, layout and production (CASE, 2001:9-13).

In addition to these tasks, editors may offer advice on the substance and structure of the text, but only exemplars should be given and no changes should be made (CASE, 2005:1).⁵ This means that editors of dissertations and theses in Australia perform mostly copyediting tasks, and ensure that the text is correct with regard to spelling, punctuation, grammar, syntax, style and tone; that the material is complete; and that the elements in the text are treated consistently.

⁵ For more information on the policy document see <http://www.ddogs.edu.au/cgi-bin/index.pl>.

Editors of dissertations and theses in Canada are also guided by a policy document. *Guidelines for editing theses* (2006) was published by EAC to provide editors with clear guidelines for editing dissertations and theses. This document provides suggestions for the degree of editorial intervention, and provides a list of tasks that editors should perform when editing dissertations or theses. This list is broad in its classification of what the editor should do, but it is recommended that authors, supervisors and editors reach agreement on which editorial tasks are to be performed. These tasks include the following proofreading, copyediting and stylistic-editing tasks (EAC, 2006):⁶

Proofreading

- C1: Correct typographical errors.
- C2: Note corrections clearly.
- C5: Assess end-of-line word divisions and mark bad word breaks.
- C6-7: Query (or correct if authorized to do so) copy-editing inconsistencies or errors.
- C12: Handle proofing stages after first proofs appropriately.
- C14: Watch for and correct the errors that result from the use of {computer} tools such as word processors, markup protocols, spell checkers, grammar checkers, optical scanners, and translation programmes.

Copy-editing

- B1a: Correct errors in spelling.
- B1b: Correct errors in word usage and amend infelicities and offensiveness in diction.
- B1c: Correct errors in grammar and syntax.
- B1d: Correct errors and inconsistencies in punctuation.
- B1e: Establish and maintain consistent patterns of mechanics.
- B2: Apply the desired style to citations and references; query any that appear to be missing.
- B3: Ensure internal consistency of text and art; query the author about apparent errors in arithmetic and in other facts within the realm of general knowledge.
- B4: Establish and maintain consistency and accuracy in the styling of tables, graphs, and other art, including their labels, captions, and text mentions.
- B5: Treat non-English terms in English text appropriately and consistently.
- B6: Use accepted marking for corrections and for queries to the author.

⁶ For more information on the policy document see <http://www.editors.ca/hire/theses.html>.

- B7: Follow common practices and the {faculty's} preferences for conventions such as the use of italics, boldface, and underlines, or metric or imperial measurements, and of abbreviations and symbols, the treatment of technical and trademarked items, and the choice of spelling and punctuation styles.
- B8: Tactfully point out copy-editing changes to the author {use query notes as needed}, and ensure that these and subsequent revisions do not create further problems.

Stylistic editing

- A8: Clarify ambiguous vocabulary and syntax.
- A9: Eliminate redundancies and verbosity.
- A10: Eliminate jargon that is inappropriate for the intended audience. {For a thesis, the intended audience is presumably academics who are familiar with the technical terms of the speciality. What is to be avoided is what *The Canadian Oxford Dictionary* calls "language marked by affected or convoluted syntax, vocabulary, or meaning."}
- A11: Correct or improve infelicitous connections and transitions, parallels, and paragraphing.
- A12: Correct inconsistencies in the form and use of headings.
- A13: Maintain consistent style in headings and in captions for tables, figures, and illustrations.
- A14: Recognise statements that should be checked for accuracy, and follow up as required. {The flaws the editor watches for under this standard and A15 are not those involving the content of a thesis but, rather, incidental references.}
- A15: Identify inconsistencies in logic, facts, and details, and query.
- A16: Write coherent and diplomatic notes to the author asking for clarification or explaining changes.
- A17: Identify, in language and in content, possible legal trouble spots or departures from social acceptability.

The examples discussed in this section suggest that academic editors, in general, limit their level of editorial intervention to copyediting, stylistic editing and proofreading, unlike in other sectors of the industry, where substantive editing frequently forms part of editors' work. Although very little literature is available on the type of editing done by editors at academic journals, the examples discussed in this section (Exactica, and Technical Editing and Proofreading) indicate that editors who work on articles limit their editorial intervention to

copyediting and stylistic-editing corrections. This is similar to the work of editors who work on dissertations and theses. With regard to content and structural editing, academic editors will call the author's attention to outright errors, and will not correct these errors. Furthermore, given the fact that most academic editors work on a freelance basis, certain extra-textual skills (such as project-management skills, technical skills and personal and interpersonal skills) are important for their work.

3.4 CONCLUSION: A COMPREHENSIVE LIST OF EDITORIAL TASKS AND SKILLS

The aim of this chapter has been to discuss the various skills associated with editing for different sectors in the editing industry, based on a literature survey. Four sectors were identified as relevant to the South African editing industry: editing for book publishing, editing for mass media, technical editing and academic editing. The overview of the various types of editing distinguished in industry standard textbooks (see Section 3.2) provided a categorisation mechanism for the various tasks associated with the different sectors in which editing is done, incorporating textual as well as extra-textual skills. Two main categories of tasks and skills have been identified: textual tasks, which describe the various types of editing and editorial tasks for which editors are responsible; and extra-textual skills, which outline the various skills and types of knowledge editors require to complete their work successfully. Each category was then further categorised into groups of tasks and skills that differentiate the various levels of editing and types of knowledge. These categories have been identified to serve as parameters for the classification of skills across the four industry sectors. The categories and their related groups of skills are:

Textual tasks for editors

- Copyediting
- Stylistic editing
- Structural editing
- Content editing
- Proofreading

Extra-textual skills for editors

- Technical skills
- Personal and interpersonal skills
- Procedural skills
- Specialised knowledge

The discussion in Section 3.3 has discussed the tasks, skills and knowledge associated with the four sectors of the editing industry identified for the purposes of this study, based on a literature review. These tasks and skills have been combined and consolidated in Table 3.2 below. This table reflects all the editorial tasks and skills across all four sectors of the industry and is therefore a comprehensive summary of all the tasks and skills that may form part of an editor's work, categorised according to the parameters set out in Section 3.2.3. The identification of these tasks and skills is of key importance for the empirical portion of the study, which seeks to identify only those skills that are of salient importance for all the sectors. Table 3.2 will therefore be used to draft the survey that forms part of the empirical investigation of this study. The aim of the survey is to identify which tasks and skills all South African editors (from all four sectors) perceive as relevant to their work. The identification of these tasks and skills will allow for the differentiation of core tasks and skills, which may form the basis of core standards applicable to all South African editors.

	CATEGORY	TASKS AND SKILLS
TEXTUAL TASKS	Copyediting	<p>Check and correct accuracy and consistency of:</p> <ul style="list-style-type: none"> • spelling, • punctuation, • grammar and syntax, • terminology, • numbers, units and measurements, • use of foreign languages, • headings (numbering, levels, position, etc.), and • tables and lists. <p>Check and correct accuracy and appropriateness of illustrations.</p> <p>Correlate parts (table of contents, references, cross-references, reference lists, etc.).</p> <p>Check and ensure that the text is in line with the design specifications (such as layout and formatting).</p> <p>Check accuracy and completeness of:</p> <ul style="list-style-type: none"> • end matter (indexes, appendices, glossaries, etc.), and • preliminary pages (all lists, preface, acknowledgements, title page, etc.). <p>Approve and collate author's and proofreader's changes for the typesetter.</p>

<p>Stylistic editing</p>	<p>Check and correct accuracy and appropriateness of:</p> <ul style="list-style-type: none"> • vocabulary, • register, • style, • tone, and • sentences (structure, focus, inter-sentence connections, etc.). <p>Check and correct to ensure:</p> <ul style="list-style-type: none"> • an appropriate level of readability for the text, • the text is of interest to the intended audience, and • clarity. <p>Check for and remove/correct:</p> <ul style="list-style-type: none"> • verbosity, • ambiguity, and • repetition and redundancy.
<p>Structural editing</p>	<p>Check and correct accuracy and logic of:</p> <ul style="list-style-type: none"> • headings, • divisions of sections, • sequence of sections, • relationship between text, and tables and graphics, • argument structure, and • verbal signposts (standfirsts, captions, crossheads, pull-quotes, page turns, dropped caps, running heads, etc.). <p>Check and correct:</p> <ul style="list-style-type: none"> • missing markers (such as errors of sequence for <i>first</i>, <i>second</i> and <i>third</i>, or the lack of use of these markers), • unfulfilled announcements, • problems with backward and forward references, and • unexplained acronyms and abbreviations. <p>Check and impose appropriate physical structure in a text (for example, ensuring that an article to be printed in a newspaper or a magazine adheres to the <i>inverted pyramid</i> structure, or that an academic dissertation follows the <i>introduction, discussion, conclusion</i> structure).</p>

	<p>Content editing</p>	<p>Check and correct/query content for:</p> <ul style="list-style-type: none"> • completeness, • appropriateness, • accuracy, • logic, and • legal issues (such as bias, slander, copyright infringement, libel, etc.). <p>Select, edit and crop illustrations and graphics for the text.</p> <p>Copyfit text for publication.</p> <p>Write/rewrite sections of the text.</p>
	<p>Proofreading</p>	<p>Check and correct proofs and print-ready pages for accuracy and consistency of:</p> <ul style="list-style-type: none"> • spelling, • grammar, • punctuation, • word breaks, • facts, • type specifications, and • formatting and layout. <p>Check that all the editor's and author's changes have been incorporated into the typeset document.</p>
<p>EXTRA-TEXTUAL SKILLS</p>	<p>Technical skills</p>	<p>Management skills include:</p> <ul style="list-style-type: none"> • the ability to plan projects effectively, • the ability to manage projects efficiently within budgetary and time constraints, and • sound business and management skills. <p>Technological skills include:</p> <ul style="list-style-type: none"> • knowledge of the latest DtP- and word-processing software, • knowledge of the various editing methods (for example, correctly using track changes during online editing, or accurately and clearly indicating corrections on the hardcopy manuscript), • knowledge of website design, maintenance and management, • knowledge of the various methods of querying, and • the ability to organise and manage online projects. <p>Sourcing skills include:</p> <ul style="list-style-type: none"> • the ability to source the latest reference guides, • the ability to source reliable information, and • the ability to source latest articles for the website.

<p>Personal and interpersonal skills</p>	<p>Personal skills include:</p> <ul style="list-style-type: none"> • highly developed reading skills, • intuitive language skills, • patience, • perseverance, • a good general knowledge, • a desire to learn constantly, • a strong personal code of ethics, • the ability to work under pressure and for long hours, • a keen interest in news and world events, and • good judgement skills. <p>Interpersonal skills include:</p> <ul style="list-style-type: none"> • the ability to develop and maintain good working relationships with and between the various industry role-players (authors, journalists, designers, typesetters, proofreaders, etc.), and • the ability to bring any issues and problems to the author's attention sensitively and diplomatically.
<p>Procedural skills</p>	<p>Procedural skills include:</p> <ul style="list-style-type: none"> • knowledge of the publishing process, • knowledge of the various stages of production, • an awareness of the function of various role-players, • knowledge of the costs associated with the various stages of production, • issuing invoices, • managing finances, • marketing, • negotiating contracts, and • administration.
<p>Specialised knowledge</p>	<p>Specialised knowledge includes knowledge of:</p> <ul style="list-style-type: none"> • linguistic principles and sub-disciplines, • text types, • text structures (for hardcopy publications as well as online publications), • design, layout and formatting principles, • the requirements of the different industry sectors, and • specialised subject matter.

Table 3.2: Tasks and skills for all editors

The following chapter presents the methodological procedures employed in the empirical component of this study.