



# WHAT KIND OF EDITING DO YOU NEED?

**A DAISY EDITORIAL GUIDE FOR AUTHORS**

*What editorial service do you need? Is it proofreading or copyediting? Or maybe a critique or a developmental edit? There are lots of possible tasks in the editorial process, so identifying what your text needs, and finding the right professional to do the job, is important. This short guide summarises the main editorial stages and explains what Daisy Editorial can help you with. You may find different definitions of editing services elsewhere. That doesn't matter so long as both you and the professional you work with agree on which tasks are included and which aren't.*

## **Publish like a pro**

You need to do things in the right order or you will create unnecessary work for yourself and the professionals who work with you, not to mention expense. I recommend reading the [free CIEP guide](#) to using editorial professionals (*not just because I wrote it ☺ but because it will help you understand the editorial process*).

## **The publishing workflow**

*Design comes last!*

**Tip:** *Don't spend time formatting the pages to look like a finished publication as I may have to strip out your efforts as part of the clean-up process.*

I regularly get drafts from authors who have spent a long time trying to make it *look* like a book or final document, but the text hasn't been edited yet. The first thing I usually do is strip out all the fancy fonts, the text boxes and other formatting that's *unnecessary at editing stage* so that I can focus on the words. As part of the edit, I then prepare the file properly for the layout stage, taking into account what the particular typesetter or designer needs. The author has therefore wasted a lot of time and effort, and has made my job more difficult (and expensive). I understand that you're eager to see what the end result will look like, but it will help your editor enormously if you stick to a plain vanilla text with as little formatting as possible. It doesn't matter what it looks like yet.

*Focus on the big picture first*

If you are the only person who has read your text, or you've only had feedback from friends or relatives, you need to get professional (or at least impartial) input on the big picture before paying for detailed editing. A traditionally published book or text goes through several rounds of editing before it's ready for publication.

*Research and take advice on what you need*

You may need some or all of the following editorial services:

- **Critique or appraisal:** a summary report on your draft text to check that it's on course to meet your aims
- **Developmental/structural edit:** making sure you've got all the basic content you need and the structure is clear
- **Sensitivity read:** making sure your tone and language choice and your portrayal of people and events are correct for your intended audience
- **Line edit:** improving the choice of words and the flow of the text

By this stage you should have more or less stopped adding new content or making major changes, because next comes ...

- **Copyedit:** fixing the detail for consistency, clarity and correctness
- **Layout:** preparing the final formats for publication (designing the basic look may start earlier, but the actual layout can't be done until editing is finished)
- **Proofreading:** a last quality check of both the words and the layout

Copyediting and proofreading involve numerous consistency checks plus one or more complete readings of your text word by word and line by line. That's why they take time!

## Working with Daisy Editorial

I will help you identify which editorial services you need by asking you about your text and what you intend to do with it. If I'm not the right person to help you – or not yet – I'll tell you that and recommend what to do next.

*What I do*

- Copyediting (including basic line editing and rewriting)
- Proofreading
- Design and layout of print and digital books, documents and other content

*What I don't do*

- Critiques and appraisals
- Developmental or structural editing
- Book cover design
- Marketing and distribution, publishing your book for you

## Proofreading

People often use the term 'proofreading' to mean any level of correction of a text, but in fact this is the very last stage of editing when you have finished amending your text and it has been laid out in the format that will be published. It is a final quality check to make sure that no serious errors have been missed and that the layout on the page is correct. Only minor changes are usually made at this stage as they can have knock-on effects throughout the document, which can be time-consuming and therefore expensive to fix.

If you still need help with grammar and punctuation, word choice and flow or other substantial language checks, you need one of the earlier stages of editing. If you need a service that I don't offer (such as a critique or developmental editing), you'll find a professional to do that in the CIEP Directory at [ciep.uk/directory](http://ciep.uk/directory).

## Copyediting

Once you are happy with the overall structure, content and tone, your text is ready for copyediting, which is the main service I offer. The aim is to produce a clear and consistent text that reads well, while maintaining your own voice and style, and that is ready for layout.

*My copyediting service typically includes:*

- Checking for errors in spelling, grammar and punctuation
- Agreeing style preferences with you, creating a style sheet and imposing consistency (such as variant spellings, punctuation, use of capitals)
- Basic further line editing and minor rewriting if needed to ensure that your text flows well, is logically ordered and is appropriate for your target readers
- Querying suspected errors of fact and misleading information
- Flagging parts that are unclear or ambiguous or use jargon where plainer words might be better
- Checking that any tables, illustrations or figures correspond with what's written in the text and that captions are present and correct
- Checking that references, citations and notes are correctly ordered and styled and none are missing
- Making sure you have any necessary publishing information (such as a copyright statement)

## *Style matters*

Most copyediting changes are made not because something is 'right' or 'wrong' but to apply consistent style preferences. For example, you can spell some words with an -ise or -ize ending (recognize/recognise). You might decide that you want to use capitals for job titles (the Managing Director), or that people's initials should take full stops (Mrs J.W. Smith), and you want dates written in full (22nd June 2015). It wouldn't be wrong to go instead for the managing director, Mrs JW Smith and 22/06/15. What matters is that your text is consistent. I will check that your style preferences are applied correctly. If you don't have your own house style or preferences I will create a style sheet for you.

**Tip:** *Many of the 'rules' of grammar or spelling we have been taught in the past are not hard-and-fast rules at all. Language and usage are always evolving.*

## *Prepping for layout*

Copyediting also includes preparing your text for the designer or typesetter by marking up structural elements such as headings, tables, lists, boxed items, displayed quotes and image placeholders. This simply identifies where each element begins and ends – it's not the design. Your designer will agree with you what your finished publication will look like. Usually I'll do this preparation by applying paragraph and character styles and some tags. If required I can use tags throughout. It will help me to know which method of markup your designer prefers, or you can put me in touch and I'll sort it.

During this preparation I'll run my standard clean-up processes to remove anything that can cause problems at layout, such as extra spaces, unused styles, unwanted line breaks, tabs used instead of proper indents, and so on.

## **What's not included?**

While copyediting and proofreading go a long way to shaping up your document, there are some core tasks that remain yours as author. It is your responsibility to check **factual accuracy**, including measurements, dates, names, historical facts and the like (but if you claim the Battle of Hastings was in 2066, I'll query it!). You must also check for any **potential legal issues** in what you write and take legal advice if needed. For example, if you are writing a memoir about real people you will need to check you are not exposing yourself to risk of defamation claims.

The following are not usually part of a copyeditor's or proofreader's remit, unless negotiated separately:

- Development of or planning the content
- Substantial rewriting or cutting/expanding of word count
- Doing research for you or checking factual accuracy
- Checking the accuracy of information in bibliographies and references (for example, author names, publication dates)
- Checking that index entries refer to the correct page numbers
- Obtaining permissions for using images, quoted extracts and other copyrighted items
- Producing/designing the final layout; creating or amending artwork/graphics
- Taking in *substantial* amendments or rewrites after the edited or proofed work is returned to you

## How to prepare your text for editing or proofreading

For proofreading please send the finished layout file, ideally as a PDF. I can also work with other formats, such as an InDesign file or a PowerPoint presentation.

For copyediting please send your text as a **Word document** with minimal formatting – for example, just Normal style for body text, the built-in heading styles and bold and italic words identified. You will also need to use Word to review the edits I make, so make sure you have a recent version of the program. If you can do the following it can help to reduce the cost of editing by saving me time in the clean-up process.

- Don't try to make your document look like a finished product/book, with fancy fonts and formatting, as I'll probably strip that out in the clean-up process
- If you know how, please use proper paragraph and character styles
- Avoid using too many different fonts and text sizes – stick to one or two
- Never use repeated tabs or spaces to indent text or to make 'tables'
- Leave only one space between sentences, not two
- Don't add an extra line space between paragraphs – use the space after setting in the paragraph style instead
- Don't put anything in separate text boxes – your text should be a continuous flow on the page
- If you paste in text from elsewhere, especially from a web page or digital file, paste it as plain text so that you don't carry over unwanted formatting

## What to expect during copyediting or proofreading

### *Proofreading*

For proofreading of PDF documents I will mark required changes using the PDF commenting tools. You can review these using the free Adobe Reader program. You or your designer will need to make accepted changes in your layout file and then check that everything has been amended correctly.

### *Copyediting*

First a warning. You need to be satisfied that you have finished making major changes to your text before you send it for copyediting. Please also double-check that you send me the latest version. If you send me new material or changes after I've started editing, you'll still need to pay for any work I've already done, even if it's no longer of use because you have replaced that text. It may also take me longer to incorporate your new material, so I may need to charge you an additional fee (and neither of us wants that).

For copyediting I will mark edits using the Track Changes tool in Word. I will explain how to make sure you find and deal with all the markup. I will also compile separately for you, if relevant:

- A list of queries for you to answer
- A style sheet of decisions on spelling, punctuation, capitalisation and similar
- A final 'clean' version of your document with all agreed changes accepted

## Design and layout

You can tell me your design requirements or I will work with you to suggest and agree a design for your publication. I'll send you some initial design ideas, we'll discuss your preferences and then I'll finalise the design specification.

Layout of your work in its final format happens once you have finished editing all the words and content. For example, I can prepare for you:

- Interior pages for print books (not book covers)
- Ebooks and digital publications (for example Kindle or PDF)
- Formatted Word, PowerPoint or Excel documents
- Promotional materials such as flyers, information sheets and infographics
- Word templates set up with your chosen styles to use in future

## Practicalities

Before I start work I will need your contact/billing address, email and a phone number. You will need to confirm that you accept my general terms and conditions and I may ask you to sign a services agreement that sets out specific terms we have agreed.

I usually ask new clients to make part or full payment in advance (particularly if not UK based). If this applies I will email you an invoice with bank transfer details and won't start work until payment is received. You will pay the balance of my fee once I have completed the tasks we have agreed.

## My promise to you

- I will work to high professional standards and in accordance with the [CIEP Code of Practice](#)
- I will keep your work, samples and communications confidential (unless of course you give me permission to share)
- My aim is to help you polish your writing for better reader engagement
- I know when to intervene and when to leave alone
- I won't impose my own voice in your writing because I think it sounds nicer than yours
- I can quickly learn your house style, or devise one for you, and make sure it's used consistently
- I will endeavour to be clear about what I need from you and will clearly explain what I have done with your work
- I will always deliver work on time if I have what I need from you and will be transparent about my pricing

## Ready to get to work?

Send me some sample text to get a free no-obligation quote for copyediting, proofreading or design and layout.

[margaret@daisyeditorial.co.uk](mailto:margaret@daisyeditorial.co.uk)