

**What does an editor or proofreader do?**

**Notes for authors on the  
editorial process**



A DAISY EDITORIAL GUIDE FOR AUTHORS

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[daisyeditorial.co.uk](http://daisyeditorial.co.uk)

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*Do you need proofreading or editing? Or maybe a critique, a developmental edit or even proof-editing? 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 services I offer.*

## **Which service?**

I will establish at the outset which services you need by asking you questions about your work and what you intend to do with it. The following notes summarise what I mean by the different terms. Both proofreading and copy-editing involve numerous consistency checks plus one or more complete readings word by word and line by line. That's why it takes time!

### **Proofreading**

This is the very last stage when you have finalised your text and it has been laid out ready for publishing. It is a final 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 adding text or images can have knock-on effects throughout the document. If you're not there yet, you need copy-editing.



### **Copy-editing**

Any work on your draft text before it is in final format is called editing. Especially if no one else has read your work, it may first require a review of structure, tone or content, or a critique to identify ways to sharpen up your writing. Once you are happy with the overall structure and content, it is ready for copy-editing, which is the service I offer. The aim is to produce a text that is unambiguous and reads well, while maintaining your own 'voice' and style, and that is ready for layout or printing. Copy-editing typically involves a range of tasks that get your text into shape for publishing:

- checking for mistakes in spelling, grammar and punctuation
- creating a style sheet and imposing consistency in eg spelling, punctuation, capitals
- ensuring it flows well, is logically ordered and is appropriate for your target reader
- marking up or formatting structure – eg headings, tables, lists, boxed items, quotes
- checking any illustrations and figures correspond with what's written in the text
- checking references and notes are correctly ordered and styled and none are missing
- making sure you have any necessary introductory pages (prelims)
- querying obvious errors of fact, misleading information or parts that are unclear.

## Clean-up

Onscreen editing of electronic files also includes my standard clean-up process to remove such potential problems as extra spaces, unused styles, unwanted line breaks, tabs used for indents, and so on, to ensure the file is ready for layout or passing to your designer. It also allows me to make global changes to your document quickly and efficiently. If required, I can strip out formatting such as italics that can be lost when importing text into layout software such as InDesign or QuarkXpress and replace the formatting with appropriate tags.

## Matters of style

A lot of editorial changes are made not because something is 'right' or 'wrong' but to apply consistent style. 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 write 22/06/15 but to be consistent I will check that your style decisions are applied correctly. If you don't have your own house style I will create a job style sheet for you.

**Tip:** *What you learned as 'rules' of grammar or spelling may not be hard-and-fast rules at all. Your editor will guide you on usage and style.*

## What's *not* included

While the copy-editing and proofreading processes will go a long way to shaping up your document, they do not usually include substantial fact-checking or rewriting, unless agreed otherwise. In particular, the following are not part of the copy-editor's or proofreader's normal remit:

- checking factual accuracy or subject matter, including measurements, dates, names, historical facts etc (but if you claim the Battle of Hastings was in 2066, I'll query it!)
- substantial rewriting or cutting/expanding word count
- checking the accuracy of information in bibliographies and references (eg author names, publication dates); I will only ensure correct formatting (except student work)
- checking that index entries refer to the correct page numbers
- obtaining permissions for using illustrations, quotations etc
- taking in substantial amendments or rewrites *after* the edited or proofed work is returned to you.

## Facts and legal stuff

Please remember that I will be editing or proofreading your content for things such as correct spelling, punctuation, grammar and readability only. It is your responsibility as author to check factual accuracy and to be aware of any potential legal issues with what you write (though I may query something if I think there's any potential problem).

## Students

If you are a student and you have asked me to edit or proofread your academic work, such as an essay or dissertation, I will need written confirmation from your supervisor that she or he is happy for you to use this service. I will only check student work for basic issues such as correct spelling, punctuation and grammar. I will not be able to rewrite or restructure your document as it needs to be essentially your own work. I will not format your citations and bibliography for you but will highlight example instances where you have not followed the appropriate referencing style.

## Layout

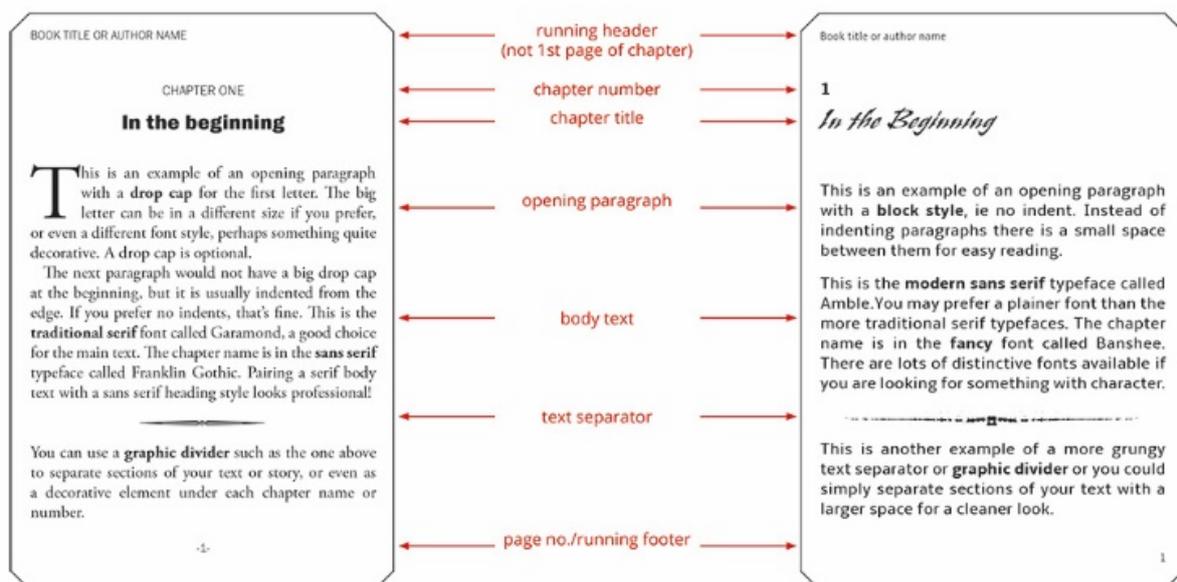
Layout happens once you have finalised all the words and content. For example, I can prepare for you:

- interior pages for print books
- ebooks in different formats (eg Kindle mobi, epub, PDF)
- Word templates with styles to use for your business documents
- flyers and information sheets.

You can tell me your design requirements or I will work with you to suggest and agree a design for your book or document.

### Your design preferences

Help me prepare some design samples for you by choosing your preferred options on the form page. You can always change your mind later! There are lots of options to mix and match so this is just a starting point. The examples below show the different parts of a page that can be designed.



## How to prepare your documents

For proofreading please send the finished layout file, ideally as a PDF. For copy-editing please send your documents as plain word processor files with minimal formatting – for example, just bold and italic words and either bold or a tag to identify headings and subheadings.

**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.*

The following will 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 paragraph settings instead.
- Don't put anything in Word text boxes – keep all your text in the main document.
- If you need superscript or subscript characters, apply the proper formatting for these – don't decrease the font size and raise or lower the text.
- Insert the proper symbol for degrees – don't use a teeny superscript 'o'!

## What does editing or proofreading look like?

If you send me your work on hard copy I will mark it up using the industry-standard proof correction marks. If you're not familiar with these I will send you a list explaining what they mean.

It's much more efficient for both of us if you can supply your work as a digital file. If you have a preferred way of working you can let me know. Otherwise, in Word documents I will use the Track Changes tool and in PDF documents I will use the built-in commenting tools. If you are not familiar with these I will explain how to make sure you find and deal with all the markup. I will also compile separately for you:

- a list of queries for you to answer
- a style sheet noting decisions on spelling, punctuation, capitalisation etc
- if required, once we have agreed all changes, a final 'clean' version of your document.

## Practicalities

Before I start work I will need your contact/billing address, email address and a telephone 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 details specific terms we have agreed.

I sometimes 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.

## My promise to you

- *I will work to high professional standards and in accordance with the [SfEP code of practice](#).*
- *I will keep your work, samples and communications confidential (unless of course you give me permission to share).*
- *I will work in the best way to suit you, either onscreen or on hard copy.*
- *I aim 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.*

## Further help

Some useful links to help you work with an editor or proofreader.

- [sfep.org.uk/about/faqs/using-copy-editors-and-proofreaders](https://sfep.org.uk/about/faqs/using-copy-editors-and-proofreaders)
- [sfep.org.uk/resources/top-tips/21-top-tips-to-make-the-most-of-your-freelance-copy-editor-or-proofreader](https://sfep.org.uk/resources/top-tips/21-top-tips-to-make-the-most-of-your-freelance-copy-editor-or-proofreader)
- [youtu.be/YFSkxpLFdkU](https://youtu.be/YFSkxpLFdkU)

Tips on how to work with an editor or proofreader, what they need from an author, and how to make sure the process runs smoothly.

- [youtu.be/iaMMU9cbm60](https://youtu.be/iaMMU9cbm60)

Short video showing what typical PDF markup looks like and how to make sure that you find all your editor's amendments and comments.