

**Canberra Society of Editors  
and  
Australian Society of Indexers**

**PARTNERSHIPS IN KNOWLEDGE**

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**Papers Day 2**

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# Working efficiently

Glenda Browne, Australian Society of Indexers

**W**orking efficiently helps your indexing or editing business because if you are faster you can earn more money, produce a cheaper (and therefore more competitive) product, and meet deadlines more easily. Once you have mastered the fundamentals of your craft you can concentrate on ways of speeding up.

Efficiency comes from thorough knowledge of your field, experience, good communication so that mishaps are avoided, use of the best tools in the best way, getting support as needed, and good record-keeping. The ultimate success is to be able to do all these and still enjoy the work.

This article is based primarily on my experience as an indexer, and the experiences shared by other indexers on the Index-L mailing list.<sup>1</sup>

## 1. Know your craft

Before you start indexing you should have done a basic course, thoroughly studied the key texts,<sup>2</sup> and/or have been guided by a mentor. The best ways to keep developing skills are to join the Index-L mailing list and to attend meetings and courses of the Australian Society of Indexers (or your local indexing society).<sup>3</sup>

Pick up knowledge when you have the chance, as you never know when you'll need it. For example, just weeks after doing the Annual Reports Indexing Workshop run by the NSW Branch of AusSI I was asked to do my first annual report. Having done the course I had the confidence to go ahead with a new type of index.

## 2. Do the work the best way

Get things right the first time. Minimise proofreading by typing carefully and checking each entry as it is entered. This saves the large additional time load of proofreading by going back to the pages and checking for every entry. Another quick way of checking aspects of an index is to scroll through in page number order. You will notice any serious discrepancies (for example, page numbers with no entries).

Limit the number of passes you make through the proofs. Most indexers skim the text to get a feel for the overall content (some read it thoroughly), then highlight

topics for indexing, then type the index entries as a separate step. Faster indexers make only one pass through the proofs, entering as they read. This method is easiest for well-structured books with headings throughout; it is very difficult for books with complex concepts. It can help to mark up page ranges for major sections before you start.

Index to the correct level as you go. While most indexers add extra entries that are removed at the editing stage, it is wasteful to have to delete more than, say, 20 per cent of your entries. If you have a page limit, you should work out a rough idea of the average number of index entries per page and keep a check on this as you work. It is particularly difficult to add an appropriate number of index entries when working with electronic text as you can't see a whole page at a time. Similarly with web indexing, in which index entries can be added to every anchor within a webpage, it helps to have an idea of the number of entries you want to add.

Indexers who want to work for a variety of clients will need to adapt their work. One client complained to an indexer that no one could give him a quick and dirty index. One way of doing a quick and simple index is to index only from headings within the text. This way the main topics get indexed, but the indexer has some time to spend editing the index to ensure that it is well-written, though short.

Many topics recur throughout an indexers' working life, and it can be useful to reuse some of the intellectual effort done to organise these. Indexes on a general topic such as gardening or computing can be used as a basis for data entry. (If loaded to SKY Index with no page numbers, the old index entries will be available for 'type-ahead'.) General hierarchies such as the one for embryo/foetus/fetus/newborn/neonate/baby/infant/child with prenatal/pre-natal/antenatal/ante-natal/perinatal/postnatal/postpartum and so on can be devised once, then remembered or recorded for future use.

If multiple indexes are required (for example, name and subject) the quickest approach is to enter them all at the same

time, into the same file, with a code to distinguish the alternative type of entry (eg # before all the names). The different indexes can then be separated after all data entry is complete.

If a book is likely to be changed and reissued it might be worthwhile embedding the indexing in the book. Embedded indexing is also a time saver in web indexing.

Use electronic text when it is available<sup>4</sup> for data entry of proper names or words with difficult spelling. Cut-and-paste saved me much time when indexing a book on wine with terms such as 'shesh i bardhë', 'Durrëski' and 'rkatsiteli'. Imagine typing them 6 hours a day!

### **3. Communicate**

Find out your clients' requirements before you start working. For an indexer this usually means asking

- who the audience is
- what depth of indexing is required
- what parts should be indexed (illustrations? appendixes?)
- how many pages/words
- stylistic requirements (italic for references to pictures; page number ranges)
- expected delivery date for page proofs
- expected delivery date for index
- budget available/is a quote required?

You should put your agreed price and conditions in writing. I often write these in an if/then format, eg 'if I have the final page proofs by date X, then I can finish the index by date Y'. This avoids the problem of agreeing to a deadline for completing the index, and then finding that the pages do not arrive in time to allow a decent job to be done.

It is useful to be able to query an editor as the work proceeds in case issues arise that should be resolved together. Most indexers will also send the editor a list of typos noted if the editor is interested.

Successful indexers also communicate with other indexers either at meetings or via mailing lists such as Index-L.

Indexers rarely have the chance to communicate with users of the material they index. Occasionally new editions of a book will be developed in conjunction with educators. These educators can often give feedback on the usefulness of the index in previous editions. Most indexers prefer not to work with authors, although this

relationship can bring benefits, particularly in the clarification of the relationship between related terms.

Indexers even more rarely communicate with users of their indexes. At NRMA where I work on the Online Help index I am an exception to this. We have a feedback request system in which frontline staff send comments about difficulties encountered using Online Help. When these relate to the index I am able to make amendments to make the index easier to use. In a practical index of this sort it is useful to introduce bias—that is, to index commonly used topics in more detail than others, to ensure that they will be found without question. I have also discovered that visual aspects of indexes are important, and often cause problems. I believe that the biggest global improvement that could be made to indexes is to increase their font size by one or two points.

### **4. Use the best tools...**

The most important tools an indexer needs are highlighting pens and a computer with appropriate software. Back-of-book indexers need a dedicated indexing package such as Sky Index, CINDEK, or MACREX.<sup>5</sup> Web indexers use tools such as HTML Indexer, HTML/Help or RoboHelp (or plain HTML). Database indexers also need software, which may be developed in-house and can range from sophisticated multi-user packages to simple home-programmed MS-Access databases.<sup>6</sup>

Once the software has been bought and installed it has to be learnt. Most of these packages are useful after a very short training time, but are much more useful once you put a bit of time and effort into learning their full capability.

### **5. Use the best tools in the best way**

In programs such as Sky Index you can set up a default file with your preferred settings—just start every index in this file and you will never have to fiddle. If you have clients with different requirements you can set up a default for each of them. Default settings include position and style of cross-references, page range style (for example, 153–4 or 153–154) and indented versus run-in style.

Keyboard shortcuts are usually more efficient for experienced users than pointing and clicking the mouse.

Acronyms can be set up in SKY Index so that commonly used terms do not have to be typed in full each time they are used. The abbreviations should not include groups of characters that are used in their own right in the index or you will inadvertently add many incorrect terms (if you established the acronym 'an' to stand for 'anarchy', the index would convert 'an apple' to 'anarchy apple'). This is another reason to keep an eye on your work as you go.

Many indexers use a 'Find' command, which groups entries containing the same word. They can then easily check that they have complete sets of locators at each (for example, that 'toddlers, breastfeeding' and 'breastfeeding toddlers' each have the same page numbers associated with them) and can duplicate entries and promote subdivisions to main entries if required.

Macros are useful for automating tasks that need to be repeated.<sup>7</sup> For example, a macro can be written to generate the entry 'ABA (Australian Broadcasting Authority)' from the reference 'Australian Broadcasting Authority, *see* ABA'. Macros can also be used in conjunction with cut-and-paste from electronic documents, for example to convert 'Cathy Freeman' to 'Freeman, Cathy'.

## 6. Recordkeeping and scheduling

Keep a record of all the indexes you have done, including details of book length (pages and words), index length, initial estimate, time taken, and final payment. Analyse your records to work out average speeds and index lengths, and to identify jobs that payed well. Lori Lathrop has created an 'Index Estimator' that shows the time needed for indexes of a certain page range at a certain level.<sup>8</sup>

Keep all of the indexes you have done, for use as samples or in case you are asked to index a later edition.

Keep client details (contact names and so on) as well as project details.

Use large calendars with distinct markings for each project (brightly coloured stripes to show days committed to certain projects). To balance workload it is useful to get indexing jobs that do not have strict deadlines. These include periodical indexes which can be worked on throughout the year (only the last issue has strict deadlines) and database indexing

that comes in quarterly batches. Entrepreneurial work, perhaps from a related field such as writing, can also fill the gaps. Susan Olasan runs a workshop in the US called 'Let's Get Profitable'.<sup>9</sup> In it she advises: 'Bite off more than you can chew, and chew like hell'.

## 7. Speeding up

Things that can help speed up your data entry include speed-reading courses, touch-typing courses (some of which are available on computer) and voice recognition software. A number of indexers use Dragon Naturally Speaking software for data entry. There is now an Australian version available which might work well. We found the normal version very slow to train and of no use (so far) in saving time. Voice recognition is also not ideal for indexes with a lot of proper names.

It is also important to have a comfortable work environment. Get a good desk, chair, computer, monitor, keyboard, and mouse). Exercise and take breaks throughout the day to improve quality of working life.

## 8. Support

If you are busy indexing, get help with other tasks such as household and childcare duties so that you are not trying to index while vacuuming the floor and minding the kids. A clerical assistant can help with some tasks such as data entry from well-marked up page proofs and markup of page ranges. A trainee indexer might be able to help with more complex tasks in return for training in indexing.

You might be able to share indexing work with another indexer. This works OK for biographies, for instance, where one indexer does all the names, and the other all the subjects. If you have too much work you should recommend another indexer whose work you know, or let the editor know about Indexers Available on the AusSI website.<sup>10</sup>

## 9. Efficiency offers...

Technical writers, authors and editors do well to hire a professional indexer because they bring to the task specialised knowledge and experience, along with enthusiasm and a focus specifically on the indexing task. An indexer brings a fresh eye to a project, while someone who has been working on it for months might not

be able to summon up enthusiasm for the task.

And for indexers, efficient work gives them the choice of interesting and varied work, clients of value and more free time and holidays.

## Notes

- 1 Index-L mailing list. To subscribe via email, send a message to [lyris@listserv.unc.edu](mailto:lyris@listserv.unc.edu). Do not include a subject line or a signature. In the body of the message type 'subscribe index-l yourname' (note: yourname indicates your actual name).
- 2 Wellisch, Hans. *Indexing from A to Z*. 2nd ed. Bronx, NY: HW Wilson, 1995 and Mulvany, Nancy. *Indexing books*. Chicago: University of Chicago Press, 1994.
- 3 Australian Society of Indexers. [www.aussi.org](http://www.aussi.org) (Sighted 10/02/01)
- 4 See Wyatt, Michael 'Printing Acrobat PDF files' Australian Society of Indexers Newsletter v23 n10 Nov 1999 for a general discussion of the use of PDF files.
- 5 Wyatt, Michael. 'Review of Cindex for Windows 1.5 and SKY Index Professional 5.1 (revision)'. Australian Society of Indexers Newsletter v24 n9 Oct 2000.
- 6 Jermey, Jonathan. 'Access to indexing 1: Creating a specialised lexicon' Australian Society of Indexers Newsletter v23 n11 Dec 1999 and Jermey, Jonathan. 'Access to Indexing 2: Output options' Australian Society of Indexers Newsletter v24 n1 Jan/ Feb 2000.
- 7 Jermey, Jonathan. 'Macros in SKY Index' Australian Society of Indexers Newsletter v24 n10 Nov 2000.
- 8 Lathrop, Lori. *Index Estimator*. [www.indexingskills.com/NDXESTIM.pdf](http://www.indexingskills.com/NDXESTIM.pdf) (Sighted 10/04/01)
- 9 Olasan, Susan. 'Let's Get Profitable' workshop notes. Littleton, CO: Susan Olasan, 1999.
- 10 Australian Society of Indexers. [www.aussi.org/indexersavailable](http://www.aussi.org/indexersavailable) (Sighted 10/04/01)

# The National Archives 'Bringing Them Home' database project

Jim Stokes

My first substantial experience of records issues relating to Indigenous people was when I worked on the Australian Law Reform Commission's review of the Commonwealth Archives Act in 1996–98. We looked at a range of problems relating to the accessibility and preservation of records of significance in land claims and family and community reunion, and made series of recommendations which I hope will be gradually implemented.

Matthew Storey of the North Australian Aboriginal Legal Aid Service, who was one of our honorary consultants, said something, which I think, summarises the whole issue very well:

Aboriginal people, especially ... the Stolen Generations, are surely the most regulated and recorded population in Australian history.

Yet within this there is a paradox:

- On the one hand, written records relating to Indigenous people often seem at best intrusive and patronising and at worst cruel and misleading. Furthermore, many Indigenous people see the records of the various levels of government as insufficiently accessible to themselves, but in some case too widely accessible to others.
- On the other hand, for communities with oral rather than written traditions and subject to fierce external pressures the European records—whatever their failings—often contain vital information.

A further complication is that the records which governments compiled about Indigenous people also tell important stories about European society and the way in which it interacted with the Indigenous population. So they are part of all our stories.

Yet another complication is that records relating to Indigenous people are spread over a wide range of jurisdictions, government and private.

This is illustrated by the fragmented nature even of National Archives' holdings: **Canberra**: we hold a mixture of national policy records and old NT administration records. They include records relating to:

- government expeditions
- relations with missions and institutions
- land administration (mining and pastoral leases)
- education
- fishing
- prisons
- social security
- Royal Commission on British Nuclear Tests
- Commonwealth initiatives in Indigenous affairs

**Darwin**: the records of the pre self-government NT Administration, in particular

- F1 main correspondence files of NT Admin 1915–78 (918 shelf m)
- D4082 NT Welfare Branch case files 1963–72 (6 m)
- E742 Native Affairs Branch staff files 1954–69 (2 m)
- E155 Tennant Creek welfare files 1957–(17 m).

**Melbourne**: the former colonial/state Aboriginal Affairs records, which were transferred to the Commonwealth in 1975 (following the 1967 referendum)

- Case and correspondence files for the Central Board for the Protection of Aborigines 1869–1968 (B318, B337)
- Name index cards for Aboriginal Welfare Board 1965 (B2016)
- Lake Tyers correspondence files 1865–1968 (B356)
- Lake Tyers population statistics 1922–64 (B2023).

As in many other areas of government administration, the survival of records has been patchy. It is certain that some records were destroyed that should not have been destroyed—some because their value was not appreciated, some perhaps deliberately to bury the past. For example, most of the NT Welfare Branch's so-called half caste files were destroyed in the 1970s.

NAA has addressed this problem by imposing a freeze on the disposal of records which might assist family or community reunion. This was applied to records in NAA custody in 1996 and to records in the custody of all Comm agencies in 2000. It is important to note that it does not apply

to all records relating to Indigenous people, but only to those which might reasonably be expected to assist reunion.

However, the problem with disposal freezes is that they are often too late—the damage was done many years ago.

### **The Bringing Them Home indexing project**

Giving effective community access to Commonwealth government records has always been a challenge. Only a few per cent of Commonwealth records survive to be transferred to NAA, but even so we hold around 250 shelf km of records designated for long-term retention. These records were created by hundreds of agencies using a wide range of systems of organisation. We have acquired with them a range of indexes and lists and we have applied our own descriptive standards to them.

Traditionally, it was necessary to approach records from the top down, through administrative histories and series registrations to index cards and transfer lists.

Even then individual file titles are not necessarily an accurate or complete guide to what is actually in the file.

Over the past decade NAA has developed the RecordSearch electronic database (now available through the NAA website) which includes all agency and series registrations and around 3 million individual items. But this is only a small percentage of the total number of items in NAA.

In any case in a complex area like family reunion even a complete list of item titles is of only limited use—a detailed index of the contents of each item is necessary.

As part of the Commonwealth government's response to the HREOC Bringing Them Home report in December 1997 NAA was given \$2 million over four years to index, copy and preserve thousands of files relevant to family and community reunion.

Indexing began in July 1998 and will continue until June 2002.

So far we have examined more than 15,000 files, about half of which proved to be worth indexing. We have searched nearly 550,000 individual folios and made around 170,000 entries on the database

(including multiple occurrences of references to the same people).

### **Indexing strategies**

These are not easy records to index. In the main Commonwealth case management records series (e.g. welfare, Tax, Defence personnel, Veterans Affairs) you would expect to find personal details recorded completely and consistently. You would expect at the very least to have full names and date and place of birth and death recorded. But in many records relating to Indigenous people, particularly in the nineteenth and earlier twentieth century, the only identifiable reference may be a single name imposed by Europeans, together with a geographical location. In consequence the same person may have multiple index entries which can not be definitely linked at the time of indexing.

We had to design an indexing standard which could capture whatever information existed in a way that would help researchers to as far as possible link a range of very embryonic references to the same person.

Our indexing sheets (from which data is later entered to the database) provide for surname and given names (including alternative forms), a primary/secondary/tertiary relevance code, birth and death information, sex, an events date range and age of subject at the time of the event and any place names associated with the reference. We also have open and closed comments fields.

Some of the issues we had to consider were:

### **The database**

We are using an Access database and all data entry is done by a single DPO in Canberra. The Access database was adopted a simple solution to get the project up and running. It was intended that within six months the BTH database would be integrated with the RecordSearch database. For various technical and sensitivity reasons this was not done and we have had problems with slow operating speeds as the volume of data increases. We are in the final stages of converting the database to Access 2000 and transferring it to an SQL server, which should improve its performance

considerably. Our next project is to develop more sophisticated search strategies.

**Another issue, which we need to face, is who can use it.**

The database is basically an index to records rather than record itself. Even so it contains information which the subjects and their communities might well consider sensitive, especially in aggregation.

NAA's position is that the database is intended to facilitate family and community reunion, not to be a general guide to records relating to Indigenous people. People generally seek information from the database through the Link Up groups, for whom NAA staff run searches on the database.

Access to the records themselves is granted under the memoranda of Understandings between NAA and Indigenous groups, which were signed in 1997 in the Northern Territory and 2000 in Victoria.

Anyone else seeking access to the records must do so under the normal public access provisions of the Archives Act. The records we index are listed at item level on the RecordSearch database, but members of the public would not be able to access the BTH database as a finding aid. Some of the records would certainly be subject to 33(1)(g) unreasonable disclosure of personal affairs exemptions.

If Indigenous groups were generally agreeable, we would probably incorporate the database into RecordSearch and make it generally available via the Internet. However, it is clear that the Indigenous advisory groups, particularly in the Northern Territory, would not be prepared to accept this at this stage.

**Indexing priorities**

We are working our way through the relevant records in the NT, Canberra and Melbourne.

We know there are some relevant records in our other offices and we will move into these later this year.

We have not indexed the big Commonwealth personal case file series. Examples of these are armed service personnel records and Commonwealth public service and Australian National Railways staff files. The problem is not only that there are tens of thousands of shelf kilometres of them, but that in many cases it is not possible to reliably identify Indigenous people. We might consider indexing some service personnel files if Indigenous soldiers have been identified through other research.

**Accountability**

We are very much aware that we were given this money for a specific humanitarian purpose. We made a detailed submission to the Senate Legal and Constitutional Committee's inquiry last year into the Bringing Them Home response and we appeared before them. Both from the hearing and the subsequent written report we formed the impression that the Committee was aware of what we are doing and did not have any specific concerns about it. The Committee was obviously concerned about the fragmentation of records between jurisdictions and from their questioning we thought they might be inclined to recommend the development of a single national database, which would certainly be an interesting challenge. However, somewhat to our relief, they did not take this up in the written report.

The committee did strongly urge that there should be more accountability and scrutiny of Bringing Them Home response projects and not doubt we shall be involved in this.

# Valuing your services, having your services valued

Pamela Hewitt, Canberra Society of Editors

Editors and indexers, on the whole, are

- highly skilled, combining generalist and specialist knowledge
- highly qualified, usually with a first degree, often with one or more postgraduate qualifications
- highly experienced, often with a track record of ten or twenty years in the industry
- working in industries at the forefront of technological change, at the very heart of the information revolution.

This is looking promising. Surely here we have the cream of the knowledge society, highly prized specialists for the industries of the future. It should go without saying that, as employees, we should command high salaries, a company car and generous executive packages. As freelancers, the sky should be the limit. What wouldn't a corporate client pay for the services of such people?

But wait. There are some other characteristics of the editing and indexing trades that I haven't yet mentioned. Consider these

- a lack of specialised, accredited higher education courses
- a predominantly female, underorganised workforce.

Even more damning

- our work is to do with words.

And, difficult as it is to measure, I would suggest that there is another killer factor at play here. As a rule

- we love our work.

We find it stimulating, fulfilling, varied, creative, engrossing.

When all these factors are combined, it turns out that we have a couple of professions where the work is bound to be grossly underpaid.

This doesn't mean that we should remain underpaid.

The purpose of this paper is to explore our options to see if we can't think of ways that we can ensure that our services are adequately valued. I mean valued in both senses of the word.

There is a range of options that we can explore as individuals and as members of professional societies to improve the

standing of the professions in the industry and in society. These include

- professional association or trade union membership and activism
- improving our technological skills
- promoting educational pathways for initial training and ongoing professional development
- showcasing our skills to business, clients and the public through the activities of professional societies, through partnerships with other professionals...

The list could go on. Many of these options are being explored in other forums at this conference, and I hope that they prove fruitful. I hope that in years to come, people will recall this conference as the starting point of many positive professional partnerships.

My focus is a little more inward looking. While the activities that I have just outlined are vital, there is also a place for taking a step back and looking at how we think about ourselves. At the risk of sounding overly self-analytical, I suppose I am talking about the importance of professional self-esteem.

I called this paper 'Valuing your services, having your services valued' in the belief that the first will lead to the second. In order to value ourselves and our services properly, it might be helpful to remind ourselves **why** our services are valuable.

1. Here is one good reason, to begin with. You are good at what you do. You have to be. We all know that in the commercial world, you are only as good as your last job. If you are getting work, especially repeat work or work that comes via personal recommendation, then by definition you must be offering a valuable service.
2. When we offer our services routinely in the workplace, or in the form of a quote or a tender, editors and indexers offer a great many skills. We bring our knowledge of the trade, of course. In addition, we often bring
  - knowledge of specialist fields (languages, academic disciplines and subject areas, technology)
  - knowledge of the publication process

- the ability to meet punishing deadlines
- specific negotiation skills for working with authors, designers, illustrators, printers, typesetters, management or editorial boards...
- high levels of speed and accuracy
- many years' experience.

Paragons like us would do well not to undersell such virtues.

By this stage, I hope you are all feeling worthy of respect and recognition. But of what practical use is this knowledge, you might ask yourself, if the marketplace holds your skills in low regard. In what follows, I propose some ways that we might put this 'professional self-esteem' to use.

Next time you provide a quote, or you find yourself negotiating with a client, think of it also as a platform to demonstrate the calibre of your professional skills. The next time you are working with colleagues, think of these activities as a way of increasing your knowledge of the profession. And if you are pressured to undermine your own worth by selling yourself short, think of the effects on your fellow indexers and editors.

Here are five ways to consider as avenues to augment the value you attribute to your own services.

My **first proposal** for considering the merit of your own work can be summarised by the word **solidarity**.

This is a quaint old-fashioned word that I think retains contemporary meaning. If I undercut my colleagues, in the long run I undercut myself. If I sell myself short, I sell my colleagues short. If I don't value my own services, I undervalue the services of my colleagues. I prefer not to do any of these things. I would rather that my colleagues didn't behave this way towards me. Solidarity forever.

A **second way** of improving your position in the industry at the same time as providing benefits to others is a simple one—**networking**.

There are advantages to being part of most groups. Networking through professional societies, at conferences such as this one and through more informal groups can increase your professional awareness and increase the real value of your work. How? You might find out about new technological developments. You could

hear about professional opportunities. A well connected indexer or editor can direct a client to an appropriate colleague who has specific expertise for a particular job. This might be experience with a certain kind of software, the ability to understand Russian, a background in astrophysics or expertise in literary editing. That colleague could be you, this time or next time. All of these forms of networking can help us to provide better services or add value, to use the management jargon of our age.

Most of us have had the experience of people asking us to help find work or to help find someone with the right skills for a particular job. It helps everyone to put the right team together. As well as letting you know about opportunities, networking can also alert you to problems in your local industry. Networking might let you know about a client who pays late or not at all or about the disadvantages of a new contract under offer. Information like this can stop you from wasting your time and help you to target your services, which is another way of valuing your time and effort.

Our professional societies are networks, as are our personal links with other professionals. In addition, there is room for formal and informal groups of editors and indexers to join together to put forward tenders requiring specific combinations of skills and also to balance better the times of flood and famine that we often experience. No one wants to recommend a client whose work is not up to scratch and the best way to find out the calibre of your colleagues is to work with them.

**Third**, knowing your own worth is crucial when you are **negotiating**.

Your services will be valued and you will be taken more seriously if you start any negotiation from a position of strength. By this I mean working out your bottom line and deciding your position in advance. In the negotiating room, don't be tempted to shift from this position unless you are offered some additional element that might make a new deal worthwhile. Put simply, this is another way of valuing your services. It means that in any negotiation you are clear about how far you are prepared to go, and it means that you will never walk out of the negotiating room empty handed. Even if you don't get the contract, you walk out with your professional standards

undiminished. You know that you have not undersold yourself (or your colleagues).

This leads me to **my fourth area**, and it is a vexed issue. People don't talk about it much in my experience, but it doesn't mean that it doesn't happen. Can I be the only person here who has been asked to lower my rates for some special reason? Yes, I'm talking about the dreaded D word, **discounting**.

I don't think that bakers or mechanics are routinely asked if they will bake bread or fix cars for less than their advertised prices, but I know that editors are. Clients sometimes ask for discounts, we sometimes give them. In fact I am not opposed to discounting under any circumstances (although I know that some editors say they are). What I am opposed to is random discounting. An explicit discount for work you consider to be in a good cause or because the job is intrinsically interesting is very different from a discount because the client is trying it on, or because you feel sorry for the person asking for a discount or because you find it hard to say no. If you make a point of letting clients know that you are providing your services at a discount rate for particular purposes, they shouldn't expect it from you or any other colleague as a matter of course in the future.

If a client genuinely has only so much in the budget for editing, instead of working for less money, it might be possible to negotiate performing a different service that does not involve underselling your skills. (This can happen when the client is an individual, paying out of their private resources. It might be possible to offer a manuscript assessment or a chapter edit, instead of the full edit originally discussed.)

**Finally, quoting.** Quoting is a very public way in which we tell the world what we think we are worth, by offering to do a particular set of tasks for a specific sum.

Many of you will be familiar with the following scenario: your quote for a specific job is accepted. When you begin, or part of the way through, you find that the specifications have changed. The job is bigger than the one you quoted on or there are endless meetings that you were not told about or you are asked to incorporate author changes that were not part of the original quotation. Again, bakers are not expected to throw in extra cream buns,

much less to double the amount of bread they agreed to bake for a certain price. Mechanics will charge you more if you bring the car back with a new problem. I have known them to charge twice for the same problem! This is not the place for a detailed discussion of quoting protocols. But I would say two things about quotes or tenders if you want others to value your services.

- The **first** is to make sure your original paperwork is very clear about precisely what your quote covers and what it does not. This can save a lot of heartache. It clarifies your position in the event of any later differences in interpretation of words and phrases in the written quotation such as 'editing' or 'compiling an index'.
- The **second** is to suggest that you resist client requests to perform extra tasks for no extra payment. It sounds so simple, and yet if all the editors in Australia did this, we would find we were not taken so much for granted and our services were valued a great deal more. Overnight, perhaps.

When clients place us under pressure to lower our rates, or to do extra work for no extra payment (which comes to the same thing) remember that behind an hourly rate lurk many hidden costs. In particular, remember that a freelance editor or indexer is paid by the hour, by the job, by the page, or, the ultimate in piecework, by the word. Time is certainly money, but time is not our only cost. Freelancers are not paid when they are sick, they do not receive superannuation benefits, recreation leave, long service leave, professional development, they are not paid for the time spent in administration, coping with IT problems, preparing quotations, or for the costs of running a car and upgrading equipment. When the government 'reforms' the taxation system so that small businesses collect a new consumption tax on its behalf, it does not pay those businesses for their efforts, even when the number of tax returns increases from one a year to five a year. So when you fail to incorporate those costs in your services, you are giving them away, as well as your time and your skills.

Before I finish, you are entitled to wonder whether I have ever been guilty of any of the practices I have just cautioned you about? I confess that that in preparing

this paper, I have dosed myself with the medicine I now dispense.

Much of this paper has concentrated on outlining the problems we face in ensuring that our services are adequately valued.

You might ask 'If it's all so hard and so poorly recognised, why do it? Why not be a baker or a mechanic?'

It has been said that doing the work you want to do is worth \$100,000 a year (a comment attributed to Isaiah Berlin). Add that to whatever you earn, and indexing or editing starts to look pretty attractive.

It's heartening to know that what you do is creative, worthwhile, skilled and absorbing. It's wonderful indeed to find your work satisfying. It's great to be happy with your work.

But you might as well be happy AND valued.

*In writing this paper, I tried to get useful data on editors and indexers. As I expected, meaningful information is hard to come by. The terms editor and indexer cover a multitude of sins. They are both at once too specific and too general to collect information about.*

*This is why I decided to conduct a survey, handing out a questionnaire at the conference. This captive audience seemed too good an opportunity to miss. The survey asks you about your professional priorities, your educational and employment background, your special skills and your current rates. Filling it in is of course completely optional. Our aim in undertaking such a survey is to provide some useful data for the societies to use in publicising the levels of skill and expertise of indexers and editors, and to gather information that can be a basis for further advocacy work. As well as the issue of rates, the survey briefly covers a few other areas - education and training needs, your ideas on the implications of technology in your field and your views about appropriate roles for professional societies. The organising committee for this conference will undertake to compile the information that comes out of the conference survey. We hope that the professional bodies and future conferences will circulate it through their respective societies and branches, creating a useful national database.*

# The Sixth Edition of the Commonwealth's Style Manual

Loma Snooks

I'm delighted to have the chance today, on behalf of the team revising the Commonwealth's Style Manual, to tell you about the forthcoming sixth edition.

First, I'll look at the broad differences between this new edition (due out later this year) and the fifth edition, which was published in 1994. I'll explain the structure of the new manual and make a couple of comments on each chapter and give a brief description of our team's background and responsibilities on the project.

## **Broad differences**

There are some major differences between this sixth edition and its predecessors. The first difference relates to how it is being produced: it's an outsourced contract.

As most of you would know, AGPS—the Australian Government Publishing Service—was the author of previous manuals. Much of the work for earlier editions was done in-house, although specialist authors were contracted to draft various chapters from time to time.

With the closure of AGPS, responsibility for the manual was transferred to AusInfo (now called Info Products) in the Department of Finance and Administration. Because AusInfo no longer had enough publishing expertise in-house to produce a new edition, tenders were invited from external contractors—and our team was fortunate enough to be selected.

There are ten of us on the team. It includes some of the people who were involved in previous editions and are thus familiar with government publishing, as well as other publishing specialists from industry, education and electronic publishing. But I'll tell you more about the team later.

Apart from the way it is being produced, what else has changed between the fifth and sixth editions? Well, there are many things. To begin with, I'll look at the broad changes.

## **Outsourcing publications**

Firstly, we needed to respond to the fairly dramatic changes surrounding publishing activities within the Commonwealth Government over the last few years. During this time, most

departments decided to outsource the production of their publications.

As a result, far fewer staff who understand the ins and outs of publishing have been retained in-house. There are also many freelancers who need a broader view of the full publishing process than they may have gained through previous work, in order to undertake these outsourced projects effectively.

## **More people can publish**

With access to the Internet and desktop publishing programs, many more people are able to publish than in the past. As you all know, anything from a brochure or newsletter to a scientific report can be produced pretty readily, without necessarily going through the quality checks that used to be applied as a matter of course by publishing professionals. Very often, these gatekeepers are being ignored or circumvented, as different communication paths are opened up.

## **Commonwealth needs**

Nevertheless, the Commonwealth must still maintain high standards of quality in the information it supplies to the community. These publications must also be clear; they must be consistent; and they must be easily accessible by as many people as possible. Otherwise, government credibility will suffer and its messages will be ignored or misunderstood.

So important elements of our brief for revising the manual were:

- to support the need for proper publishing expertise to continue to be applied to government publications
- to explain what was involved in the full publishing process, from planning through to production.

## **Primary audience**

Our primary readership was therefore agreed to be any government officer who might be asked to manage a publication, and anyone likely to be part of the team needed to produce it.

Some of these publication team members would be in-house but probably more often they would be contractors. They would range from authors to information designers, editors, graphic designers, illustrators, electronic publishing personnel,

indexers and printers. We've used the term 'publication team' throughout the manual to reinforce the fact that any publication project will require contributions from various publishing professionals.

With this focus on government needs, this edition also concentrates more on producing information documents than has been the case in the last couple of editions of the manual.

However, in refocusing the manual, we don't believe we've excluded any of the traditional users of the manual. Outsourcing has become a common approach in corporate and commercial publishing as well. So we feel the new manual will remain as relevant as it has ever been—indeed, we hope it will be even more so.

### **Publishing process**

The sixth edition therefore has a lot of new material on planning, on budgeting, and on assembling and briefing a publication team. It attempts to explain what each team member does—to bring some realism to the planning process. In doing so, it also describes general industry practices in each of the different publishing areas. Indeed, the whole manual is built around this process-oriented approach.

### **Readers' needs**

Secondly, there's a greater emphasis on readers. This emphasis is important for all publications, but is crucial for information documents. So we talk about assessing the audience, structuring documents to meet the audience's interests and needs, and using suitably inclusive and effective language.

We also look at access requirements in terms of delivery. Should the publication be presented in print, in electronic format, or both? And what can be done to help readers with a disability?

### **Updating**

Thirdly, there's the updating task common to any new edition—although the rate of change in publishing seems to be escalating all the time. As with all previous editions, we look at how usage is changing in terms of language, punctuation and capitalisation. What is likely to be acceptable to audiences? And to clients? Often, these are two quite different things.

We look at the impact of electronic publishing; and of course this is something

of a moving target. We've therefore concentrated on the broader principles that we feel are less subject to change, and have left the detailed information on software and platform-specific information to Info Products' existing *Guidelines for publications produced in electronic formats* or other government documents likely to be developed in this area.

The approach we've taken is that the principles of good writing apply equally to print and screen. However, we do recognise that readers absorb information differently when using these different media, and this has to be taken into account, particularly when structuring information. Also, there are the navigation and design issues that apply particularly to electronic documents, as well as the production information everyone on any publication team needs to have some knowledge of. In fact, electronic publishing has some impact on what we have to say in just about every chapter of the manual.

Then there are the changes in printing technology and in desktop publishing, which required us to take a new approach to the design section. In addition to changing the content of this part of the manual, we've taken advantage of the increased formatting and printing abilities now available to give the sixth edition a completely new look, without changing the overall production costs very much.

Now, to look at what the manual covers in more detail.

You'll see that the manual is divided into five parts that pretty much reflect the process of preparing any publication. Part 1 is entirely new, as is much of Part 5. The other parts are an amalgam of new material and revisions to previous advice.

Each part is bookended by an overview and a list of further reading and resources.

### **Part 1, Planning the communication**

Reflecting our emphasis on process, you can see that the first chapter starts at the very beginning of a publishing project, while Chapter 2 discusses assembling and contracting a publication team.

**Chapter 1** talks a lot about planning, and working out realistic budgets and timetables. We think that far too many publishing projects founder on unrealistic expectations, much of which can be put down to a lack of proper planning.

There are certainly many things to consider at the outset: from the purpose of the document, assessment of the audience, and deciding on whether to produce it in print or on-screen (or both), through to the resources needed to prepare it. Chapter 1 also talks about getting early input from publishing professionals and the need to develop integrated approaches.

**Chapter 2** discusses the publication management role, and how to go about finding, assessing, contracting and briefing the team members needed to produce a publication. We've made a point of emphasising the interaction needed between each team member. Too often they are kept in separate boxes, to the detriment of the project.

### **Part 2, Writing and editing**

Now we come to what many traditional users—certainly writers, editors and indexers—have always considered to be the heart of the manual. Some of these chapters you'll recognise, while others are new.

**Chapter 3**, for example, is entirely new. It looks at the different ways readers absorb information. It talks about context, attention spans, linear and non-linear structures and screen characteristics affecting reading.

It then considers ways of organising material to respond to readers' needs: everything from patterning, different types of structures, and signposting and illustrating information to 'scannability' for on-screen reading.

**Chapter 4** updates (and reconsiders) the fifth edition discussion of inclusive language, and combines this with other techniques for effective language. This chapter also looks at the characteristics of different registers: formal, standard and informal.

**Chapter 5** gathers up many of the issues discussed in the previous edition relating to grammar, and puts them in a framework of frequently asked questions. We've also added an overview here, in response to requests for 'more on grammar'. However, to do justice to the topic would need a manual of its own. We've done our best within the confines of a single chapter.

**Chapter 6** combines the topics of spelling and word punctuation, since they

are closely related. In terms of dictionaries, we've maintained the previous recommendations to stick to either the latest Macquarie or the Australian Concise Oxford. However, we've also put the issue of alternative spellings into context by explaining changing trends, and the usages likely to be most acceptable to international audiences.

In fact we've followed this approach throughout the manual: of putting our recommendations within a wider discussion of alternative usages. We've explained why we've settled on one particular choice rather than just mandating it as the only path to righteousness.

In Chapter 6, we also look at problems with apostrophes (the greengrocer's apostrophe) and hyphens, and suggest what to do with 'e' words.

**Chapter 7** acknowledges the trend to less punctuation, and recommends how far we think this should be taken.

**Chapter 8** recognises a similar trend to using fewer capitals, and makes suggestions on how to deal with this. In my experience, capitals can cause more headaches at copy editing stage than they have any right to do. So we've expanded this section to try to help.

We also look at the growing use of mid-word capitals and what to do with them at the beginning of sentences. For example, what do you do with a trade name such as 'eBook'?

**Chapter 9**, dealing with different facets of textual contrast, is mostly new. While it incorporates earlier advice on using italics, it also gives editorial advice relating to format, such as heading hierarchies and punctuation for bullet points (a tricky question at the best of times).

**Chapter 10**, on shortened forms, seems fairly innocuous—until you get into it. Should you have full stops after people's initials or not, for example?

**Chapter 11**, on numbers and measurements, is likely to have only a few changes, but we hope you'll agree with them.

**Chapter 12**, Methods of Citation, brings referencing up to date, particularly in terms of referencing electronic publications. However, we've tried not to change it too much, as it's difficult enough to learn one system. We've responded to

requests to provide more on the Vancouver referencing system as well.

**Chapter 13**, Parts of a Document, needed quite a bit of work to cover the standard parts of an electronic publication as well as the more traditional bits and pieces of a printed document.

**Chapter 14** on editing and proofreading is almost entirely new. It details the process of editing, in an attempt to make schedules more realistic. It also indicates what's generally involved in a comprehensive editing job, and what sort of services can be expected from a substantive edit, a copy edit and a proofread. We hope this information will help make clients' expectations about the outcome of an editing job more realistic as well.

However, as with the rest of the manual, this chapter doesn't try to teach professionals how to do their particular jobs; there are plenty of industry manuals that do that. But it does try to remove the mystique and to give general advice.

**Chapter 15**, Indexes, the last chapter of Part 2, takes a similar approach. It describes what indexers do in a way that the other people working on a publication project will understand. It also explains how to evaluate the quality of an index.

### Part 3, Designing and illustrating

**Chapter 16**, on Visual Identification, sets the advice about how to use the Australian flag and coat of arms within the much broader context of an organisation's overall visual image. In this way, it has a lot to say about all organisations, not just the Commonwealth. What contributes to an organisation's image? Should it ever be changed? If so, when and why?

Other new material in this chapter includes advice on using the Aboriginal flag and the Torres Strait Islander flag. We also show the formally recognised national, state and territory emblems.

**Chapter 17**, the design and layout chapter, takes you through all the elements that make up an effective design in a new and refreshing way. Then it discusses the design aspects of navigation for electronic documents:

- How do you show readers where they are within an on-screen document or site?
- How do you keep them in control of their movements around such a document?

If you want to know about frames, menus, hyperlinks and hypertext, navigation bars, site and image maps, labels and rollovers—it's all here.

**Chapter 18**, on typography, is a great example of several of our main concerns in the manual:

- It explains the whole area of typography in a way that the rest of a publication team can also understand: everything from serifs to anti-aliasing.

- It gives practical advice—for example, about type selection for readability for different types of printed documents and for on-screen reading.

- And it also shows how to evaluate the effectiveness of typographical choices.

**Chapter 19**, on preparing good tables is a complex undertaking, spanning editing and design. Tables are an integral part of many information documents, and we felt they needed a greater focus than they'd received previously. So they now have their own chapter.

This chapter gives practical advice on how to improve layout and readability. It also discusses what you need to take into account when using tables on screen.

**Chapter 20**, on Forms, which haven't been dealt with in previous editions of the manual. However, as they are becoming so pervasive, we thought some advice on usability was needed. In putting this chapter together, we had assistance from the Australian Bureau of Statistics and the Communications Research Institute.

Again, this chapter extends well beyond questions of design. As we point out, there are four common elements in a successful form:

- It has been based on careful research.
- The questions have been clearly considered and expressed.
- It has been designed for ease of use by respondents and administrators.
- It has been thoroughly tested before release.

This chapter gives guidance on how to achieve all this, whether you are producing a printed or an electronic form.

**Chapter 21** is on how to select imagery to describe or clarify concepts, or to establish a mood or point of view. It also talks about the do's and don'ts associated with using diagrams, graphs and maps, as well as line drawings, half-tones, photographs, moving images and sound.

And for the more technically minded, it describes the different colour systems for use in print and on screen, and how to deal with digital image files.

Of course, there's a great deal more in this design and illustration part of the manual that I don't have time to touch on today. But I think writers and editors will find it stimulating and enlightening. It certainly isn't directed solely at graphic designers.

#### **Part 4, Legal and compliance issues in publishing**

This part of the manual deals with regulations of one sort or another.

**Chapter 22** focuses on up-to-date, detailed information on copyright, as copyright needs to be taken into account by many different members of a publication team: writers, editors, designers and publishers. However, other topics are also considered, including:

- the collection and handling of personal information
- defamation, contempt of court and contempt of parliament
- offensive material
- provisions under the Trade Marks, Designs and Trade Practices Acts
- the use of disclaimers (for what they're worth).

**Chapter 23** gives practical information on identification systems such as ISBNs and ISSNs, bar codes and CiP data, as well as new material on metadata and URLs.

There are also guidelines on how to prepare publications in alternative formats that can be accessed by people with vision, hearing or other disabilities.

Other requirements dealt with in this chapter relate to legal deposit and library deposit schemes, and documents for parliamentary tabling.

Part 5, Producing and evaluating the product

Now we come to the final part of the manual dealing with the production end of things.

**Chapter 24**, on On-screen Production tries to demystify this area, which can be somewhat daunting for those of us who don't work with screen-based documents every day. There are various types of electronic publications:

- those that are merely being transmitted electronically for printing out at the other end

- those that need to be converted from existing printed publications
- those that are being created solely for use on screen.

Each requires a different approach. We give advice on these various processes, including technicalities such as mark-up language, graphic file formats and hyperlinking.

We also look at the different searching patterns that users follow and how to respond to these, as well as the ins and outs of search engines. And testing: this is critical for electronic publications, so we talk about the various types of tests that need to be carried out before release.

**Chapter 25** has some of the material about printing, embellishment and binding from the fifth edition. However, it has been pretty dramatically revamped to include digital printing processes.

I know some users of the fifth edition loved the information about papermaking. We've kept some of this, but refocused it into a discussion of how to choose suitable papers for different uses. This fits with our general approach of concentrating on the practical details of publishing rather than going into more esoteric territory of highly specialised knowledge.

**Chapter 26** emphasises the need to manage a publishing project throughout its life. What sort of monitoring procedures should you be following to check that the final publication will meet those early ideals?

You'll probably have collapsed in a heap or retired to a nearby bar as the publication goes out the door. But that's really not the end of it. You should still think about how to do the next one better, based on what you've learnt through the project. And to find out how successful it really was, you need some feedback from the people for whom it was all produced: the readers.

#### **Revision process**

Before I, too, collapse in a heap, there are two final things I need to do:

- First, I'll give you a quick overview of where we are up to, and how we got there.
- And then I'll introduce you to the people who helped put it all together.

#### **Starting with a summary of the process we followed.**

The main authors were given responsibility for drafting their chapters to

previously agreed guidelines. These drafts were reviewed by relevant team members and debated in lengthy meetings. Authors then revised the drafts to take account of the agreements reached at those meetings. So each chapter reflects the efforts of several team members, who may not only have made numerous suggestions for changes but also contributed various sections.

The team naturally comprises a range of views on just about every issue, which has stimulated some lively debates. However, we work on a consensus basis. If we can't convince the other members of the team of the wisdom of a particular approach, we can't really expect to have it wholeheartedly supported by the manual's users.

Having reached the second draft stage, the draft manual was distributed to Info Products' external review panel. This panel, numbering twelve in all, included Robert Eagleson of Plain English fame; Stephen Hall, who was a consultant on Info Products' Electronic Guidelines; and Judy Hutchison of the Parliamentary Library.

We're now in the process of making final changes in response to these comments, integrating everything, and doing the substantive editing. So the finishing line is well and truly in sight.

### **Background to the sixth edition team**

Now to introduce the team behind it all.

#### **Info Products**

First, I'd like to acknowledge Info Products' very supportive approach to this new edition—and particularly to Julie Hourigan, the client representative for the job. Being an old AGPS hand, Julie really understands the project, and can see what needs to be done and why.

#### **Loma Snooks**

My leadership of the team is based on twenty years' experience leading large editing and design teams on major publishing projects around Australia, and in Asia and the US. As well as the management aspects, I've written four of the new chapters, and am currently doing a lot of the revision, integrating it all and doing the substantive editing.

#### **Chris Pirie**

Chris Pirie is a freelance editor and writer, who has worked on more than sixty

volumes of reports to government, as well as numerous commercial titles. She wrote the referencing chapter for the fourth edition of the manual, which was largely unchanged in the fifth edition. She also edited *The little book of style*, which, as many of you are aware, is an alphabetically arranged guide to Commonwealth style, based on the fifth edition.

Chris has drafted four of the chapters for the new manual, and she's currently involved in the revisions. She will also be doing the copy editing and helping with the proofreading.

#### **Pam Peters**

Most of you will already know Pam Peters from one or more of her many roles:

- as Associate Professor of Linguistics at Macquarie University
- as the head of Macquarie's Graduate Diploma in Editing and Publishing
- as a member of the Editorial Committee of the Macquarie Dictionary, and Director of the Dictionary Research Centre
- as the convenor of Style Council conferences
- as the author of the excellent *Cambridge Australian English style guide*
- as the editor of her quarterly bulletin, *Australian style*.

For the fourth edition, Pam wrote the chapter on capitals and contributed to the italics and hyphenation sections. This work remained substantially unchanged for the fifth edition.

For this new edition, Pam has drafted six of the chapters. Her usage research and database of language trends have also been very valuable in ensuring that our recommendations take account of current usage.

#### **David Whitbread**

David Whitbread was previously Design Director at AGPS, and subsequently Head of Graphic Design at the University of Canberra. Many of you may also know David from the various design seminars he has presented for government and industry. And more of you are likely to know his work once his new design manual is published next month.

David has a dual role on the manual. He is the art director as well as the author of seven chapters relating to design, illustration and printing.

### **Michael Harrington**

Michael Harrington is another ex-AGPS staffer, with particular expertise in copyright and government publishing requirements. Indeed he has written three books on these topics. In addition, of course, he is an indexer of some renown, and he'll already be well known to all the indexers at this conference as the Chairman of the Australian Society of Indexers Registration Panel.

Michael wrote the indexing chapter for the fifth edition. He's updated that chapter for this new edition, as well as drafting two more chapters on legislation and other government and library standards related to publishing.

Michael also indexed the fourth and fifth editions of the manual, and will be providing the same service for this one.

### **Vickie Richardson**

Vickie Richardson (with her partner **Chris Toogood** in Netimpact Online Publishing) brings much practical experience in electronic publishing to the team. Netimpact has won industry awards for its work, including a study award to travel and research the latest trends.

Vickie has written the chapter on on-screen production and has contributed to many of the other chapters. Perhaps her most crucial role, however, has been to hassle us continually to ensure we couldn't stay cocooned in our print-focused comfort zone. So Vickie has been instrumental in ensuring that the impact of electronic publishing is taken into account in all the manual's descriptions and recommendations.

### **Graham O'Loghlin**

Graham O'Loghlin originally joined the team to provide contractual and project management advice. However, we subsequently inveigled him into doing a little of the writing as well. He has drawn on his extensive expertise in managing multi-disciplinary teams to draft contributions to our discussions on planning, managing and evaluating publishing projects. He was also the

reviewer for the on-screen production chapter.

### **Shirley Purchase**

Shirley Purchase has been a reviewer for many of the chapters in this sixth edition. She has a lifetime's experience in editing. She has worked in-house for the Melbourne and ANU university presses, and as a freelancer for AGPS, the National Gallery, the War Memorial, ATSIIC and Oxford and Cambridge university presses, among many others.

With her writing hat on, Shirley also compiled *The Australian writers' and editors' guide* for the Australian National Dictionary Centre, and *The little book of style* for AGPS.

### **Julie Hamilton**

Julie Hamilton is our graphic designer responsible for formatting the manual, and for working with David to prepare the page designs and illustrations. I've worked with Julie for more than twenty years. She is wonderful at presenting information in an intelligent and visually interesting way. She has also reviewed all the design and illustration chapters.

### **Lindsay Mackerras**

And last, but certainly far from least, there's Lindsay Mackerras. Lindsay is widely known and admired for her editorial leadership at AGPS: as Manager of the AGPS Editorial Unit, then as Style Manual Editor from 1995 and finally as Manager of Standards and Style in AGPS's Advice and Education Section.

Among her innovations aimed at educating writers, editors and others in a uniform style for Commonwealth documents were the Lunching with Style sessions, *The little book of style* and *Stylewise* magazine.

Lindsay currently has a more than full-time job as Managing Editor of *RAAF News*. However, she still finds time to keep an eye on the development of the sixth edition, and sallies forth from the sidelines with sage advice when she thinks we may be straying from the path.

# Ten steps to an edited MS: the practice of editing

Janet Mackenzie, Victorian Society of Editors

I have worked for almost thirty years as a freelance editor, and in that time I have developed a systematic, streamlined process which I apply to each job. I feel a bit exposed, discussing it here, because I realise I've never talked to anyone about it before. My family don't know what I do when I disappear into my workroom; my colleagues know what I do, they see the results, but they don't care how I do it. Nor have I ever seen this mentioned in editing textbooks—they tell you what to do, but not how.

As any editor knows, every book is different. Therefore it's more efficient to emphasise their similarities, to fit them all into the same framework, to minimise the variables, so you can concentrate on the differences that are significant. This can free you, in the same way that routine can free you to concentrate on the important things—but, like routine, it should not become an end in itself.

I'll mention editing on screen, but I've only been working on screen for a few years, and I'm still refining my processes. I'd welcome any advice and contributions on what you've found to work for on-screen projects.

What I'm presenting here today is not a franchise; it doesn't have to be adopted in every detail. I don't apply it rigidly myself. I don't hesitate to add more steps when I need them for a particular job. I don't often skip steps, though. I generally fit any job I do, from a ten-page magazine article to a 1000-page economics textbook, into this framework of ten steps. But I'm not laying down the law here, I'm trying to promote discussion. I offer my system simply as a workable model, and I hope to provoke you into thinking about your own working methods and how you can make them more streamlined and efficient.

## Keeping track

I try to keep paperwork to a minimum, but I keep three kinds of records: a schedule, a diary, and a workplan. At one time I decided to get big and employ several sub-contractors, so I had to develop good systems for keeping track of schedules and work in and out. After a while I gave up employing others, because I really prefer editing to managing, but I have been in charge of as many as eighteen jobs at a time.

**The schedule (see overleaf)**

Aug	<i>Due in</i>	<i>Working on</i>	<i>Others</i>	<i>Due out</i>
1	EDWARDS 2nd prfs	MACGREGOR edit MS		
2		MACGREGOR edit MS		
3	VINCENZO idx	MACGREGOR edit MS		MACGREGOR acxn
4		VINCENZO idx		VINCENZO idx
5		EDWARDS 2nd prfs, idx		EDWARDS 2nd prfs
6	////////////////////	////////////////////	////////////////////	////////////////////
7	////////////////////	////////////////////	////////////////////	////////////////////
8	CHAN acxns	CHAN finalise MS		
9				
10	ABERFOYLE MS			
11		ABERFOYLE edit MS		CHAN ed MS
12		ABERFOYLE edit MS		
13	////////////////////	////////////////////	////////////////////	////////////////////
14	////////////////////	////////////////////	////////////////////	////////////////////
15	HEINZ MS	ABERFOYLE edit MS		
16				
17				
18				
19				
20	////////////////////	////////////////////	////////////////////	////////////////////

**The schedule**

The schedule is the bane of every freelancer’s life. One phone call to tell you that something is coming—or, more often, isn’t coming—can change your whole week, your whole month. I keep my schedule in pencil in the front of my financial year diary. The column ‘others’ allows you to track work given to sub-contractors. When I receive a schedule for a job, I fill in all the deadlines right through to the proofs. If something doesn’t turn up on time, I phone the client or the author and find out what’s happening.

**The diary**

In my diary I record work done on each job, identified by the author’s name. In educational publishing it’s usual to identify jobs by title, but in my experience the title

sometimes changes during production, whereas the author’s name doesn’t. It’s useful to write the author’s name prominently in your diary at the beginning of each entry so you can look back and find previous entries relating to that job.

I also keep a running total of hours worked on each job, as a circled figure. When I invoice, I mark the total specially, to prevent double billing. This is important when you work on a job in stages and send progressive invoices.

**The workplan**

The workplan I maintain on screen. I adapted it from a board that I saw in the office of an engineer, and over time I’ve added a couple of extra columns as I found I needed them. I update it about once a week, more often if I’m busy.

**Last updated: 1 August**

<i>Publisher</i>	<i>Author &amp; Title</i>	<i>Stage</i>	<i>Last Action</i>	<i>Next Action</i> * = could start ** = do now	<i>Dead-line</i>	<i>Quote</i>	<i>Hrs not billed</i>
Dodgy Bros	EDWARDS Orchids for Fun and Profit	correcting 1st prfs	sent 1st prfs 5 June	collate 2nd prfs due 1 Aug	8 Aug		6.5
Camford UP	HEINZ Sociology of Sociology	waiting rev MS	ph BM 2 Aug	edit MS due 15 Aug	23 Sept	2000	3
Bench Press	CHAN Exploring Computers	MS waiting acxn	em auth 30 July	incorp acxns due 8 Aug	12 Aug	1800	22

**Ten Steps**

The ten steps of the editing process are listed below. They apply only to copy-editing; structural editing requires a completely different approach. The advice given here is for the sort of job that comes with the usual optimistic instruction ‘It’s just a straight copy edit—shouldn’t need much at all.’

Some of you may be shocked to find I go through the text sequentially and in detail only twice. But of course the ‘First Go’ and the ‘Second Go’ are notional. In fact, ‘First Go Bibliog’ may actually mean going through the bibliography three or more times:

- Read each entry completely
- Having noticed a problem with punctuation of authors’ names, go through looking only at those

- Having noticed a problem with the capitalisation of titles of books, go through reading only the italic

- Check alphabetical order.

Similarly, you might go through the text entirely as part of the First Go just to check the abbreviations, or at the end of the Second Go to check the paragraphing.

On every job, as I finish, I wish I could go through one more time to make it really good. But the publisher won’t thank you for perfection, and in the end the readers won’t pay you for it. Not every book is a Rolls Royce. I seem to spend most of my time working on Commodores—and occasionally I’m asked to produce a Commodore from material that is the textual equivalent of a ride-on mower.

## 1 Appraisal

What have you got? What haven't you got? What do you need to know?

A great lump of paper arrives on your desk. Where do you start?

First, separate the MS itself from the papers concerning it—the editorial brief, correspondence, reader's report, sample setting, author questionnaire. Look through these papers to get an idea of the project. It's important to find out, for instance, whether this is a book of papers that emerged from a conference, or a biography the author has been working on for twenty years. Take all the papers concerning, and put them in a manila folder. This is the file.

Then identify the prelims, separate them, look through them. List any missing items, such as acknowledgements or list of illustrations. Put the prelims aside. Then find out what else you've got—artwork, captions, appendixes, etc., and again note what's missing.

Now you're ready for the text. Flick through the whole thing, forming an impression of the author's methods—do the headings look okay, are there tables or pix included in the text, are the quotes set down or run on? Read a bit of the introduction or first chapter to see how it begins.

After all that, you finally read a sample of the text. Select thirty or fifty pages, and note the time; then read them, editing in pencil as you go. This will give you an idea of how long the editing will take. For this exercise don't select the first or last chapter, because they're often anomalous, quite different in style from the main part of the text. Chapter seven is a good one—the author's usually well into his stride by then.

On screen, the processes are different, but you arrive at the same result. First, as soon as you insert the disk into your disk-drive, run a virus scan on it. Then copy everything on it to your hard drive, remove the disk and store it in a safe place. This is your original copy and you may need it if disaster strikes. On your hard drive, open every file and check for compatibility problems. Check whether the author has applied styles. Then, just as you would on paper, look through to check the headings and so on, and edit a sample to judge the quality of the writing.

You now have a picture of the job and how much work has to be done. This step

should have taken you no more than three hours.

At this point it's usually necessary to clarify the editorial brief. You'll have questions about style and about production methods—how much can be left to the typesetter? You'll have to confirm the schedule. At this time also, ask about any missing copy—acknowledgements, permissions, bibliography. Who is responsible for producing the copy, and is it your job to chase them?

When you've obtained answers to these questions, you're in a position to give a quote. Quoting is a whole workshop in itself, so I'll cover it briefly here. I have a sheet of paper with the ten steps listed, as you have them in front of you, together with subheadings according to the particular job. Against every task I write an estimate of the number of hours it will take. Add them up, and add a 10 per cent fudge factor—you have to allow for unforeseen problems, because it is their nature to be just that, unforeseen. Multiply the total by your hourly rate, and that's your quote. If it looks outrageous, go back and be more hard-headed about the number of hours for each task, but don't be unrealistic.

If you're a freelancer, there is no need to tell your client your hourly rate. Insist on quoting on the actual job. Never give firm quote unless you have the complete job on your desk. If all you have is a sample, give rough estimate instead, and stress that you cannot be held to this figure. If extra tasks that were not included in the editorial brief become necessary during the editing process—such as writing captions—negotiate extra payment. When I give a quote, I name a figure plus or minus 10 per cent, and I make sure to give the publisher the benefit if I finish in less time than expected, just as I expect to be paid the maximum if the job goes to the limit.

## 2 Mark-up/Apply styles

Distinguish text from non-text

The traditional method of distinguishing non-text items—quotations, boxed text, tables questions, exercises, and so on—is colour coding, ruling coloured lines in the left margin. I go through and do this as a separate operation, reading just enough to identify the various elements. At this stage I'm concentrating on the typography rather

than the words. In a MS that uses the author–date or Harvard system of referencing, I also use a highlighter on the references in the text, so I can later check them against the list of references. You don't expect to find everything that has to be marked at this stage, but you do all the obvious stuff.

As part of the mark-up I mark the headings, but I don't grade sub-headings at this stage unless the author's scheme is really simple and consistently applied. Instead, I mark a circle next to each sub-heading, to identify it as a heading. Later in a separate operation I come back and grade them as A, B, C etc.

Colour coding is a good job to do when not you're not feeling very bright—it's a Friday-afternoon job, if you can manage it. Depending on the MS and the time of day and my mood, I may intersperse mark-up with the next step, the First Go through the text, chapter by chapter.

On screen, the equivalent to mark-up is applying styles. For the headings, I often use the default headings in Word—Heading 1, etc.—to identify them as headings, and come back and refine the system later, using global changes to apply custom headings. This has two advantages: you can use the keyboard to apply the default heading styles, which is quick; and you can use Document Outline to edit the default headings before you change them to custom headings.

When working on screen, it's important to save every few minutes, preferably at the end of every paragraph. Because Word makes a temporary file for each save, it's a good idea to close Word every hour or so to consolidate the temporary files.

If you're using a keyboard, you must guard against RSI. One way to do this is to learn to use the mouse in your left hand. This spreads the repetitious movements more evenly between your two hands. With your left hand on the mouse you can move around the screen, you can select text, and you can move text. Meanwhile your right hand hovers over the punctuation and delete keys. This is a very speedy way of editing. But remember that, all things being equal, the keyboard is quicker than the mouse. You can learn the default keyboard shortcuts, or you can customise them with Tools/Customise/ Commands/ Keyboard.

### **3 First Go text**

Identify problems, solve all the easy ones  
Your aim at this stage is to keep moving through the text fairly fast. You are trying to identify all the problems, solve everything uncontroversial, and query or note everything else. In the First Go, you do obvious things like correcting the style of dates, spelling out 'per cent', fixing the end punctuation in relation to closing quote marks. You do any bits of mark-up that were missed. You do the easy and obvious language editing, correcting grammatical mistakes and wrongly used words. You can do some of the capitalisation at this stage, especially in the later chapters.

Everything that can't be solved quickly you mark for later attention. So if there's a paragraph of knotty prose that I can't disentangle quickly, I pencil a wavy vertical line in the margin, or if there's a suspect spelling of a name, I circle it in the text and pencil a question mark in the margin.

All queries are marked in pencil, so they can be removed later. I find it useful to position queries and instructions in a systematic way. Any query that has to be referred to the author, I mark in the left margin of the MS. Anything I think I can solve, I mark in right margin. Similarly I always mark the location of pix and tables in the left margin. When you're looking for these marks, for instance to check that the table numbers are in sequence, you'll find them much faster if you know where to look, instead of having to scan the whole page, and read and dismiss all the irrelevant marks.

On screen, I use the Comments function for queries for the author, and xxx in the text for queries that I must attend to. At this stage, also, it's important to make global changes. As we all know, enthusiastic application of global changes can have unintended consequences; make them early, so you can detect any surprises in a later reading.

### **4 First Go everything else**

You now repeat this process with all the other parts of the MS besides the text. You read fairly fast through the notes and bibliography, identifying all the problems and solving the easy ones. As I said, First Go through the bibliography, for instance, may actually require three or four passes. Then you check

the notes against the bibliography and against the text, and note any discrepancies. If you're working with the author-date system, you check the highlighted references in the text against the list of references.

Similarly, you work through the tables—if there are more than two or three, remove them all from the MS, put them together and work on them together to ensure consistency. If there are illustrations, go through the artwork and the captions, compile an artwork list and list of illustrations, and check that permissions have been obtained.

As a separate operation, you go through the headings—all the chapter headings and sub-headings. You edit them for sense and style, grade them, and check them against the contents list. And similarly, you do a First Go through the prelims.

## 5 Second Go all

Solve all possible queries

You now repeat the whole process for each part of the MS, but this time your aim is to solve everything you possibly can. Now you've removed most of the distractions—misspellings, grammatical mistakes, stray capitals, etc.—you can put yourself in the position of the reader. You can concentrate on the sense of the text, and you can take a broader view. At this stage you pick up inconsistencies and contradictions in the story or argument.

You solve all the queries as you go, though you will usually find a few that are too hard. If a query or a passage of text is really holding you up, leave it. At the end you'll find you have half-dozen or so really difficult ones: being nearly at the end of the job, you can tackle them in a determined frame of mind, and either solve them or decide to refer them to the author or designer.

On screen, don't make any global changes at this stage because this is your last read. You can still do a Search and Replace, where you check every instance before you change it, but any errors introduced by global changes at this stage will not be detected.

## 6 Compile author queries

The presentation of author queries varies with the production process. The easiest method is to send the author the edited MS

with your pencilled queries in the left-hand margin. Of course you solve all your own queries and remove them before you send the MS to the author.

The most time-consuming method of preparing author queries is to type up a list. If you have to do this, don't refer to line numbers. It's quicker to refer to the top, middle and bottom of the page as a, b, c, so 118a signifies a query at the top of p. 118. Be sure to explain to the author that you're using this system.

On screen, use the Comments function. The default style for the Comment reference in the text is very small and hard to see, so you'll probably want to alter the default style to about 14 pt bold to attract the author's attention.

## 7 Documentation, extra copy

Prepare design brief, fill in forms, prepare copy for running heads, prelims

This step can be delayed, or you may combine part of it with the previous one. You will probably want to send the author the copy you have prepared for the list of abbreviations, for instance. If you're pushed for time, you can send off the author queries and leave most of the documentation until you finalise the MS, at step eight or nine. But it's better to complete the documentation as far as possible just after you have finished step six, while everything is fresh in your mind.

The documentation includes a style sheet listing particular spellings, capitalisation, and so on. for the MS, which I'll discuss in a moment.

You must also prepare a design brief, which is a description of the MS for the designer—how many pages or files, what styles are used, the heading grades, special characters needed, the number and type of illustrations, etc., and any particular points about an awkward table or list, and poetry and other special layout. Remember to explain the colour coding you have used. The design brief may also include a note to the typesetter concerning global changes to be made, or you may fill in a detailed type spec.

The extra copy includes copy for running heads, possibly a list of illustrations for the prelims, a list of abbreviations, a glossary, a blurb.

At this stage also it's wise to reread the editorial brief, just to make sure you have done everything that's asked.

#### Putting the job aside

Now you have to put the job aside until you hear from the author. You may not look at it again for weeks or even months. Whenever you put a job aside, for this or any other reason, write yourself a to-do list. After some time has gone by, you'll forget that you were going to supply the latest figures in Table 6, or check up on that publication date in the bibliography, or do an extra check on the captions. Make a list of everything that's still to be done, and place the list on top of the MS so you can find it quickly.

### **8 Incorporate author corrections**

The method of incorporating the author's corrections depends on the production process. On paper, you copy them in by hand; on screen you make the changes on the disk.

Incorporating author corrections involves comparing two versions and changing one of them. The same situation arises with proofs: you have to collate all the corrections onto one copy. I find it useful to keep the version I'm changing - the one I will write on—directly in front of me, and turn the pages to the right. The version I'm referring to is to my left, and I turn its pages to the left. This system prevents you from mixing up the pages of the two versions, which can be a very time-consuming mistake.

Similarly, when comparing two versions on screen, I use a split screen; the version I am changing is always the one at the bottom, and the version I'm referring to is always the one at the top. This prevents me from making changes to the wrong version of the document, again a time-consuming mistake.

### **9 Final check all**

Remove all unwanted marks from MS, complete documentation

After you've made all the changes that the author wants, you're almost finished. This stage I call the final check. I go through every page of the MS and all its bits and pieces. I make sure that any instructions and remaining queries are legible and intelligible, that they're circled (meaning 'do not set'), and that they're labelled appropriately for the author or the designer or the typesetter.

(Of course, we hope that there won't be any queries for the author at this stage, but occasionally there are one or two points that have to be updated in proof.)

Make sure there are no unwanted marks remaining. Very often you will query, say, the spelling of a name in five places. When the author sends corrections, you correct the two that are wrong, but often you don't remove the query mark against the three that are right. It's important to remove these marks, because they slow down everyone who handles the MS. In traditional production, the designer, the typesetter and the proofreader will all scratch their heads over these marks and think, 'Does this apply to me? Am I supposed to solve it?' Nor do they want to read a dialogue between you and the author about some point that is now resolved. Such marks really slow up the process for everybody all along the line. It's up to the editor to cross out or erase all queries that no longer apply.

On screen, similarly, you check for xxx or whatever you have used to mark queries for yourself, deal with them and erase the query marker. At this stage also, and not before, you do a spellcheck and remove double spaces. It's important to do these two operations last, because you can introduce errors as you incorporate the author corrections.

At this stage also, you check all the documentation and make sure it's complete.

### **10 Despatch/handover**

Now you've reached the last step. You write a covering letter, drawing attention to any remaining problems such as outstanding copy. You prepare the invoice, and package and despatch the edited MS.

### **Collate 1st proofs**

I also have a systematic method for dealing with proofs, particularly for collating first proofs.

First, I transfer the author's corrections to the proofreader's set, so that I have everything on one set of proofs. If an essential author's correction creates problems—for instance, alters the pagination—I make the correction in ink on the proofreader's set and add a mark in pencil to remind me to make compensating changes later.

I then go through the proofreader's set, looking at the proofreader's corrections to make sure they're necessary and desirable and don't raise problems with copyfitting. At the same time I deal with the proofreader's queries. On this pass also I solve the problems raised by the author corrections—in general, I aim to fix every problem except the half-dozen or so that are really too hard.

Then I check the prelims. This is quite a complex task. I'm sure you're familiar with the rule that says 'The larger the type, the easier it is to miss a typo.' A typo on the title page is very embarrassing, believe me. You'll need to check that the page numbers given in the contents list and the list of illustrations are correct by turning to the relevant pages. There are a lot of things that can go wrong in the prelims—pagination, folios, running heads—so check and double check.

Make a separate pass through the text and endmatter to check the headings. For every book, check the running heads. If the book has a complicated scheme of sub-headings, go right through checking nothing but the sub-headings—grading, wording, capitalisation. Depending on the book, you may have to make several separate passes to check the tables, pix and captions.

Then you make another pass to check the typography. Look at each page for widows, orphans, rivers of white space, hyphens at the end of a page. As you do this, ensure all queries are answered and—as with the edited MS—remove all unwanted marks.

Just to be sure, check the prelims one more time. If there are any really serious problems in the proofs, tag them for the designer or production editor, and list them in a covering letter. Then you can invoice, package and despatch.

### **The desktop**

To give you a complete picture of my method, I'll describe the layout of my desk, which I realise is very rigid and systematic. This really reveals me as obsessive-compulsive, but most editors are. My inflexible layout has an advantage: no matter what job I'm working on, I can put my hand on any part of the MS with ease. Naturally, I'm not suggesting you follow my plan in detail; I'm just demonstrating how to apply a system in order to be more efficient.

In the top left-hand corner of my desk is the file, in a manila folder, with the prelims on top of it. Next to them are the chapters yet to be worked on; immediately in front of me is the chapter I'm working on; to the left the chapters I have already read. To my right are my pens, ruler, white-out, and the style sheet and the running sheet, which I'll explain in a moment. Off to the right are the illustrations, captions, appendixes and other bits and pieces. Beyond them the system breaks down and there's a bunch of used coffee cups, personal mail, unpaid bills and other debris which we won't examine.

### **The word list**

A word list or style sheet is kept for every job, detailing the spellings, capitals, hyphens, etc. peculiar to the MS. Traditionally this has been called the style sheet, but since Microsoft Word has hijacked the word 'style', I'm starting to refer to it as the word list to prevent confusion. If you're working on screen you can keep the word list on paper, or you can have it on screen, keeping it open in another window so you can refer to it easily.

On paper, some people rule their word list into twelve or twenty-four boxes; I use six, but you can suit yourself. On the bottom of it I scribble notes about things I have to tell the typesetter—en rules for dashes, curly quotes for straight quotes, etc. Make sure you write the author's name and the title in the top left corner of the word list. In fact, always write the author's name and the title on any documentation or separate part of the MS—nothing is more demoralising than to find a word list, or an index, or a record of a phone conversation, and not know which job it refers to.

### **The running sheet**

The running sheet never had a name until I began to prepare this talk, because I've never mentioned it to anyone. It's just a sheet of paper that I have for every job, and can't manage without. It lists the ten steps, with sub-headings appropriate to the particular job, and the number of hours I expect each task to take. As I've said, I prepare it for the quote, and I keep it by my side during the job to monitor my progress. Thus if I've estimated six hours for 'First Go text' and I find it actually takes ten hours, I know immediately that I have a problem, and I have to renegotiate the job with my

client; if I find that I'm lingering too much on the Second Go—enjoying the book too much—I can press on a bit faster, or resign myself to losing money on the job.

I add other information to the running sheet as the job progresses. I scribble on it general points to be raised with the author, with the designer, and with the client. These notes form the basis of the author queries, the design brief, and the covering letter. I also note extra tasks that I see are necessary, such as checking the paragraphing throughout, and adjust the hours to allow for them. And I jot down major, unusual problems—a table that has to be reworked, or renumbering of the pix in chapter 5, all the 'too hard' ones that need special attention. When I'm putting a job aside and need a to-do list, I generally write it on a spare corner of the running sheet, so that I can gain a complete picture of the state of the job from this one piece of paper. With the running sheet in front of me, I can answer desperate phone calls about missing captions or tasks not done in a calm, professional manner, even if I haven't looked at the job for a month.

### **Handling the MS**

I'll also say a word about the physical handling of paper MSS. Again, I'm obsessive about the shape of my MS. I like it to be a solid block of paper, with the edges as tight as if guillotined. You stack paper like this for the printer and the photocopier, do it for yourself too. It makes the MS much easier to work with.

With the MS in a solid block, I can see the edges of the coloured sheets that I use to separate the chapters. This enables me to find any chapter quickly and see where it begins and ends, which is particularly valuable if the notes are presented at the end of each chapter. With the MS in a solid block, I can riffle the pages with my thumb to find either a particular author query in the left margin, or a query to myself in the right margin. Much of editing consists of checking and cross-checking—was that name spelt that way last time, wasn't it 1993 when the minister resigned, and so on. If you set up your work so that it's easy to cross-check, you're more likely to do it.

Whenever I have to refer to another part of the MS—a previous chapter, a list of captions or whatever—I take my ruler and place it across the chapter I'm working on.

Then I open up the other chapter on top of the ruler, to look for the relevant spot. This saves getting pages from the two chapters mixed up, which can be a time-consuming problem, as I've said.

I'll just say a word about the use of tags. Large numbers of tags devalue the currency and become counterproductive. Nothing makes my heart sink like a 300-page set of proofs with 250 tags. As I've said, in collation of proofs you go through every page of the proofs several times, and check every correction and query. It's a complete waste of time for the proofreader to apply all these tags, and in fact it shows ignorance of the production process. Tags should be used to draw attention to particular, serious, unusual problems, not to every routine query and correction.

On screen, I'm still developing my processes for handling MSS. I have a directory for each publisher, and I name all my files by the author's surname, or the first few letters of it, plus standard abbreviations. Thus 'Smith-aqq2' is a second round of author queries on the Smith MS; 'Smith-desbrf' is the design brief, and so on. The actual MS is in a folder of its own, called xSmith, so I know it's the manuscript itself and not papers concerning it. Within that folder I use 'Save As' at the end of each stage, so it will contain files called 'Smith1', 'Smith2' or 'Smith-orig ms', 'Smith-ed ms' or whatever. As far as possible, I prefer to have the whole text of the MS in one file, rather than a separate file for each chapter, because I'm more likely to make global changes and cross-check thoroughly in the file I'm working in. It's tedious to have to open a dozen files every time you want to make a global change or a Search and Replace.

Backing up is a chore, but re-doing a day's work is a worse chore. I use a Zip drive, which is very fast and makes back-up pretty painless. Do a back-up after every session, and at the end of each day do an extra back-up and put the disk in another room. Ideally, every month or so you should do a complete back-up of everything and store it off-site—say, at a friend's house—in case of total disaster.