Professional EDITORS' Guild

Copy-editing academic texts:
Guidelines for students and authors

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As a student or author in the process of writing your thesis, dissertation or journal article, you may have been informed that you need to have your work edited by a professional. These guidelines aim to assist you by clarifying what you need to know about the world of editing. After reading this brochure, you will be able to differentiate between proofreading and copy-editing; know the roles of student/author, supervisor and copy editor; know how to find a copy editor; and have a basic understanding of the editing process.

Academia uses theses, dissertations and articles as a way of testing your ability as a postgraduate student at master's or doctoral level to use written communication effectively to convey your research findings, ideas and arguments. The examiner also checks your ability to use citations and bibliographic references correctly. The bedrock to assessing a student's or an author's worth is ultimately a document that should comprise your own original thinking and words presented in as cogent and convincing a manner as possible.

The editing *troika*

Three parties are involved in the editing process, or editing *troika*: the student, the supervisor and the copy editor. The copy editor's role in the *troika* should be limited to a fairly light touch, fixing your words so that they convey your work correctly, clearly, logically and convincingly.

Copy-editing can be defined as the correction of a manuscript to ensure that it conforms to certain rules, which include grammar and spelling rules, usage rules (eg word choice, correct use of verbs in different sections and other language-based issues) and the institution's house style (eg font, numbering of sections, tables and figures, and referencing style). In addition, it involves editing for consistency in the use of terminology, layout, numbering and headings (Mossop, 2007: 37–38).

The ethics of copy-editing

Copy-editing raises several ethical questions:

- What kind of editing is appropriate?
- How much editing is permissible?
- At what point is there a risk that the thesis, dissertation or article is no longer the author's own or original work?

The word *ethics* relates to the principles guiding right or wrong behaviour in society. Ethical standards govern the conduct of a person, especially a member of a profession.

The Professional Editors' Guild (PEG) aims to uphold high standards of editing and proofreading through ethical standards of practice. To this end, PEG members adhere to a code of conduct that incorporates competency, professional conduct and professional reputation. PEG members further commit to continuing professional development (CPD) to ensure knowledge of and best practice in editing, and to keep up to date with developments in the industry.

The roles of student/author, editor and supervisor

What is your role as a student or author who is seeking a copy editor?

You should ensure that you understand the following:

- The sections and/or sequence of information required in your thesis, dissertation or article (ask for a clear explanation from your supervisor)
- The different roles of the supervisor and the copy editor

- The difference between a proofread and a copy-edit
- The reason why only a final document, signed off by your supervisor, should be submitted to a copy editor
- Where and how to find a qualified and experienced copy editor (bear in mind that there are plenty of people out there masquerading as copy editors when they are really not)
- The lowest quotation is usually not the best – one must check qualifications, experience and professionalism
- A deposit needs to be paid to the copy editor before they begin, with the balance due before receipt of the edited document.

What is the supervisor's role?

Supervisors should provide their students with editorial advice on:

- Research techniques and ethics, including issues such as plagiarism
- Matters of content, substance and structure, which include the order in which sections should appear, the font and size of headings, sub-headings and text
- How to interpret and present the research literature and data
- How to use citations and create a reference list based on the institution's style rules
- How to use illustrations and tables, and how to acknowledge the use of such materials created by others
- How to use language (including clarity, voice and tone, grammar, spelling and punctuation, and style of writing, which includes verbosity and repetition)
- How to use technical and specialised terminology, including abbreviations
- Supervisors may also do a limited amount of copy-editing and proofreading.

The supervisor intervenes in the student's research and writing at whatever level is appropriate to ensure that the final draft of the thesis, dissertation or article is acceptable.

What is the copy editor's role?

The role of a copy editor can include any or all of the following tasks (Beene, 2009: 11):

> To tighten a manuscript's rambling prose; smooth awkward transitions; suggest more appropriate wording; restructure disorganized information; query the writer for additional information or clarification; ensure a consistent style; add headings, subheadings or captions; and, in some instances, suggest completely rewriting sections.

There are three levels of editing:

1. *Substantive editing* (including structural) involves assessing and shaping material to improve its organisation and content – editing to clarify meaning, improve flow and smooth language. Substantive editing is **not** appropriate for examinable texts.
2. *Copy-editing* ensures consistency, accuracy and completeness.
3. *Proofreading* is the process of examining material after layout to correct obvious errors in textual and visual elements.

Academic copy editors may only **copy-edit** and **proofread**. A copy editor will edit your thesis, dissertation or research paper according to the standards described below.

Copy-editing versus proofreading

Briefly, the difference between a copy editor and a proofreader is that a proofreader will look for misspellings, incorrect/ missed punctuation, inconsistencies (textual and numerical) and so forth. Copy-editing, meanwhile, is the process of correcting problems with writing such as sentence construction and language clarity.

For **copy-editing**, the following are permitted:

- Ensuring clarity of expression and flow of text
- Reducing ambiguity, wordiness and needless repetition or drawing the author's attention to it

- Introducing clear and logical connections between phrases, clauses, sentences, paragraphs and sections
- Correcting errors of grammar, spelling and punctuation
- Ensuring the appropriate use of idiom, style and tone
- Making sure that technical and specialised terminology is used correctly, including discipline-specific terms, abbreviations and units of measurement
- Imposing consistency in the presentation of illustrations, diagrams and other display items
- Establishing consistency of basic formatting to meet style guide requirements
- Checking and correcting the reference list according to the prescribed style (copy editors do not check the accuracy of the bibliographic information)
- Cross-checking the references (an additional service)
- Commenting on layout, captions and labels of images, and limited formatting of tables.

Many a student or author, when looking to have their thesis, dissertation or article polished for presentation, will ask for a 'proofread', not knowing that their work really requires a copy-edit – usually a heavy one. So what is proofreading and how is it different from copy-editing?

Proofreading includes checking that all elements are complete, consistent and correctly placed. The following checks are permitted:

- The completeness of all parts of the work (eg that an abstract is included, that chapters, figures and tables are in order, etc)
- The correct use of grammar, spelling and punctuation
- Consistency in the use of language, style, terminology, numbers, symbols, abbreviations, capitalisation, italics and other mechanical elements in the text
- Consistency in the presentation of illustrations and tables
- Consistency in the format and layout according to a specified style
- Conformity of references and citations to a specified style.

Proofreading is therefore always the lightest touch, which in most instances will not ensure that your thesis, dissertation or article will meet the standards of your examiners. The content remains the author's responsibility.

The Institute of Professional Editors Limited (IPEd) confirms what is **not** permitted:

> It is not the responsibility of the editor to identify issues of content, such as checking facts and possible inappropriate use of others' work or the acknowledgement of such work. However, if possible problems of this type are identified, the editor may advise the student to check the university's guidelines and to seek the advice of the supervisor.

The copy editor may not:

- Add corrections to the content (including tables and figures), substance or structure of a thesis, dissertation or article; however, the copy editor may note problems for the author's attention – usually in the Comments in an MS Word document
- Check facts, reference to others' work or plagiarism
- Shorten or rewrite text
- Conduct research on behalf of a student or an author.

If problems of this type are identified, the editor may advise the author to check the institution's guidelines and to seek advice from the supervisor.

Services for which copy editors may charge extra:

- Checking the accuracy of bibliographic references
- Formatting
- Although a copy editor will generally (re-)edit texts they have corrected, the editor will need to submit a new quotation or cost estimate if a completely new text is submitted after the original has been edited.

Improving your skills

As an academic researcher, how can you improve your writing and researching skills and prepare for your work to be edited?

- Writing your thesis or dissertation will probably be one of the most difficult things you will ever have to do. Organise your time wisely, with extra weeks calculated in for unforeseen delays.
- Some universities have bridging or writing programmes to prepare students – ask your supervisor whether one is available at your institution.
- Make contact with the institution's librarian and see if they can help you to improve your writing and research skills.
- Read through theses and dissertations from your faculty that have been completed in the past two or three years, particularly those recommended by your supervisor.
- Before you start writing, read through the style guide of your institution and follow the guidelines and referencing style precisely. (Note: Things can go seriously wrong with citation wizards and referencing programmes if you do not know how to use them. In addition, it is often not possible for the copy editor to edit them.)
- Make a point of keeping your writing simple and jargon-free. Use shorter, simpler words and phrases wherever possible and keep sentences to fewer than 30 words (15–20 words per sentence on average is regarded as the ideal).
- Become familiar with MS Word's Track Changes function, as this is the programme used by most copy editors to show you all the changes they have made to your text.
- Also familiarise yourself with MS Word's Comments function, as the copy editor is likely to raise questions or make suggestions in Comments where they are not permitted to make the changes themselves.
- A thorough edit generally takes longer than people think – three weeks or more for a dissertation of 200+ pages. You will also need time to read carefully through all the corrections and comments – and possibly do a fair amount of further reading and writing, interacting with your supervisor or consulting your sources – before your work is ready to be submitted.

How do you go about finding and choosing a competent copy editor?

- Ask for a referral from your supervisor
- Check the existing database of freelance copy editors at your institution
- Contact professional membership organisations, such as PEG
- Consider the qualifications, experience and membership status of potential editors (PEG has categories of membership that define the level of work experience and degree of skill, with the highest membership level – Accredited – meaning that the member has passed a formal assessment with a pass mark of 80%)
- Assess the quotation – did you receive a formal quotation and is it clear and comprehensive, not cheap and vague?

Communicating with your copy editor

- Make contact with a copy editor well ahead of your deadline for handing in – two to three months – so that your copy-editing can be properly scheduled.
- When requesting a quotation it is helpful to supply the following information to your editor: your faculty or discipline, the word count of your document, a sample chapter or several pages of the writing (to determine the extent of editing required), your deadline and any other information or specific editing requirements you may have.
- Most editors do not work with drafts, as they may end up (re-)editing sections several times. This is especially problematic if there is a tight deadline. Only send your final document, signed off by your supervisor, for editing.
- When sending your paper for copy-editing, include a copy of the institution's style and referencing guidelines.
- Most copy editors work with MS Word documents. If your document is in a different format, you will either need to agree with your editor that your format is acceptable or you may need to convert the document to MS Word.

What can you expect to receive back from a professional copy editor and what happens after the editing is complete?

A professional copy editor with experience in editing academic texts such as yours will usually send you two or three documents upon completion of the editing: (1) your original MS Word document showing all the corrections (in Track Changes) and comments and suggestions the copy editor has raised, and (2) a PDF of the same document as proof of the extent of their editing. (3) In addition, the copy editor may provide you with a style sheet showing the decisions they made for the sake of consistency (eg spellings, punctuation, the treatment of dates and numbers). (Be mindful that this depends

to a large degree on the time allocated for the edit and the rate you were given.) (4) In addition, on request, a copy editor will provide a certificate of editing that confirms the nature of the services rendered.

What should you do with the edited document?

- Do not simply select 'Accept All Changes' without considering the corrections the copy editor has made. One reason is that you or your supervisor may disagree with some of the changes and you may have to undo them.
- Another reason is that the copy editor will have asked you questions or made suggestions about your structure, content or wording which are important to respond to. Doing so will lead to a much-improved document that is more likely to impress your examiners.
- Referencing may have been done incorrectly and therefore flagged for your attention to correct according to the required style. Accurate referencing remains the responsibility of the student and care should be taken for each entry.

We hope that these guidelines have served to inform and equip you as you go about your research and writing. For further information or to source an editor, visit the PEG website at www.editors.org.za.

Sources

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