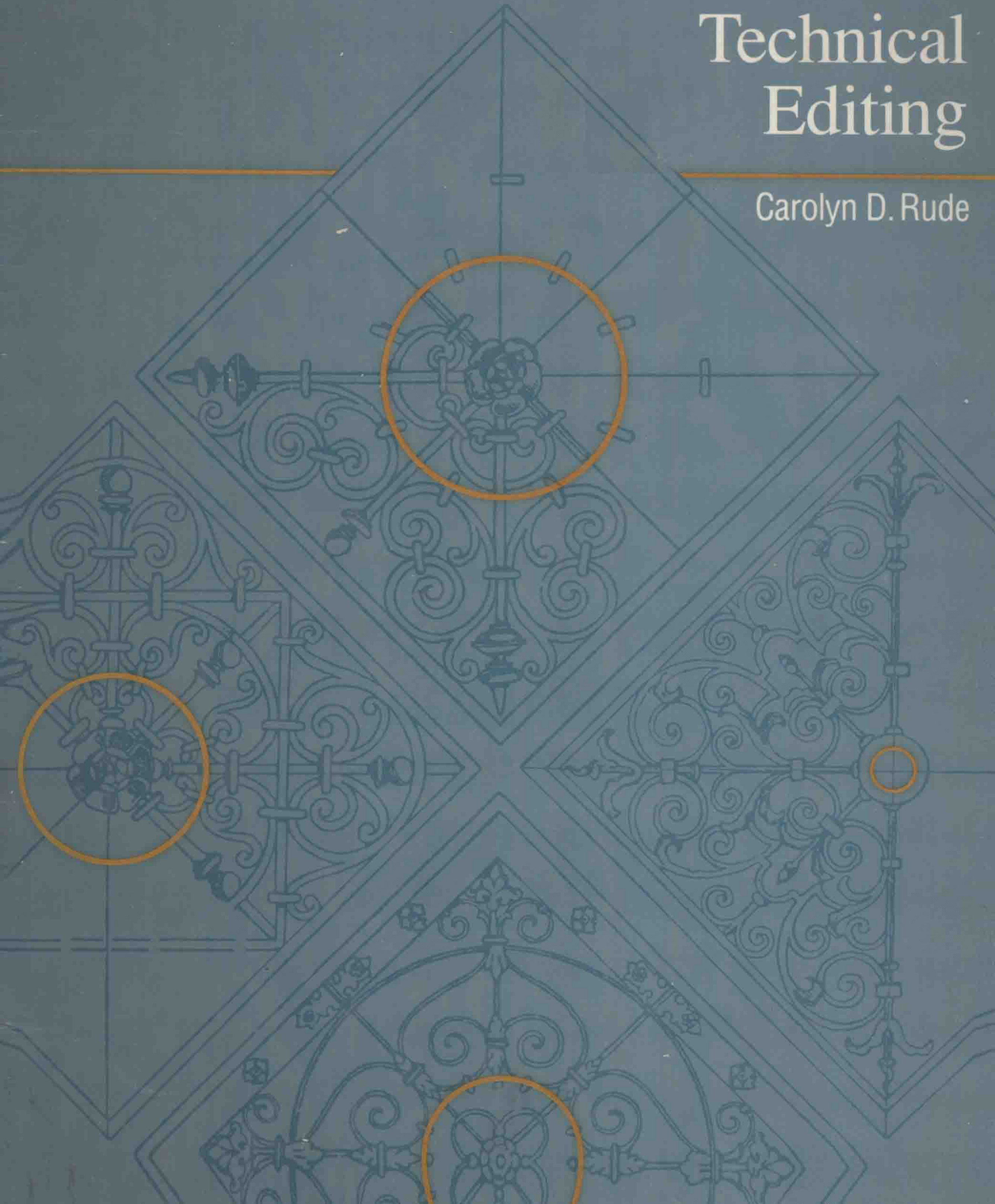
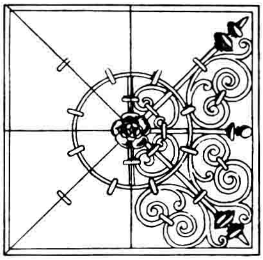
Technical Editing

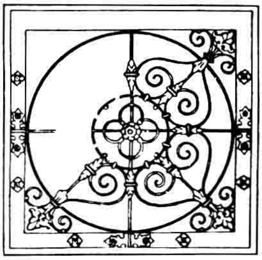
Carolyn D. Rude



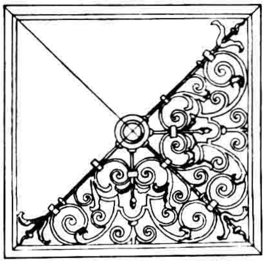
TECHNICAL EDITING

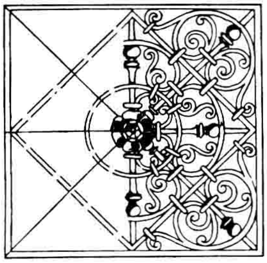
CAROLYN D. RUDE
Texas Tech University





WADSWORTH PUBLISHING COMPANY
Belmont, California
A Division of Wadsworth, Inc.





TO DON AND JONATHAN

English Editor: Angela M. Gantner
Assistant Editor: Julie Johnson
Editorial Assistant: Lisa Ensign
Production Editor: Sandra Craig
Text and Cover Designer: Andrew H. Ogus
Print Buyer: Karen Hunt
Permissions Editor: Jeanne Bosschart
Copy Editor: Thomas L. Briggs
Compositor: T:H Typecast, Inc.
Signing Representative: Linda Tiley

© 1991 by Wadsworth, Inc. All rights reserved. No part of this book may be reproduced, stored in a retrieval system, or transcribed, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without the prior written permission of the publisher, Wadsworth Publishing Company, Belmont, California 94002, a division of Wadsworth, Inc.

Printed in the United States of America

1 2 3 4 5 6 7 8 9 10—95 94 93 92 91

Library of Congress Cataloging-in-Publication Data

Rude, Carolyn D.
Technical editing / Carolyn D. Rude.
p. cm.
Includes index.
ISBN 0-534-15000-4
1. Technical editing. I. Title.
T11.4.R83 1991 90-49997
808'.02—dc20

PREFACE

Technical Editing presumes that the full range of editing, including substantive editing, can and should be taught. It expands on previous publications on editing that explain copyediting and sentence-level editing for style but do not address the substantive issues of content, organization, and format. These whole-document issues affect the usefulness of the document more than do sentences. Sentence-level editing is ultimately meaningful only in the context of the whole.

A guiding thesis is that editors collaborate with writers in the design of documents. This thesis purposely conflicts with the definition of editors as fixers of errors. As document designers, technical communicators are like architects and engineers, who plan buildings and bridges for use as well as for visual pleasure. Technical documents are used by readers to provide information and to enable actions such as making a decision or completing a task. Document design encompasses all the features of a document that facilitate those uses, including its content, organization, format, style, visuals, and grammar. Even when editors begin work on a project after planning is complete, they make choices about these features to accommodate specific readers and purposes—that is, to achieve the design goals.

This book is written for students who have completed at least one college course in technical communication and for practicing editors with some experience in technical genres. It presumes that readers have been introduced previously to such terms as *style, noun, line graph,* and *instruction manual,* and it presumes some competence in technical writing. Chapters on spelling, grammar, and punctuation review concepts readers have learned before and do not substitute for a handbook. One important purpose of those chapters is to refresh students' vocabularies so that they can talk about their editorial choices and can choose on the basis of knowledge, not just preference. The glossary reinforces the premise that professional technical communicators master the vocabulary of their discipline.

Specific instructions for editing are rooted in theories of how readers comprehend and use documents. The book emphasizes reasons for making editorial decisions, assuming that editing requires high-level thinking and judgment. The suggestions for further reading point students to sources that will expand their knowledge of how and why documents function and thus develop their bases for making editorial decisions. The discussion and application exercises aim to develop concepts and sound thinking as well as skills.

The book is arranged to parallel the typical career path of editors and the typical instructional sequence in an editing course. Just as editors generally must master copyediting before they are given responsibility for substantive editing, so here do copyediting functions precede substantive editing and managerial functions. Courses for advanced students may review the early chapters quickly and concentrate on substantive editing. The arrangement from copyediting to substantive editing also facilitates use of the book in sequential semesters or quarters, with the basic course focusing on copyediting skills and the advanced course focusing on editing that requires more judgment.

Part I, Definition of Editing, includes two chapters of background material, Editing: The Big Picture, and Readers and Documents. Although some chapters in Part IV, Management and Production, could be suitable foundations for learning about line and substantive editing, both students and teachers are probably eager for some hands-on experience. Thus the seven chapters in Part II, Copyediting, immerse students in the concepts and details of line editing and proofreading, including copymarking; spelling, capitalization, and abbreviations; grammar and usage; and punctuation. Chapter 8 offers specific guidelines for quantitative and technical material. Part III, Substantive Editing, focuses on the process of substantive editing and such topics as style, organization, format, and visuals.

This arrangement means that students will have considerable practical experience in both types of editing and will be able to better appreciate the material in Part IV. Chapter 15, Collaborating with Writers, and Chapter 16, Computers as Editorial Assistants, both argue that the first step is to master editing. However, neither chapter presumes knowledge from earlier chapters, and they may be interspersed with material in Parts II and III. The remaining chapters, Type and Production (Chapter 17) and Management (Chapter 18), take students beyond issues of content to the appearance of the final document and the complete print production process.

试读结束，需要全本PDF请购买 www.ertongbook.com

Technical Editing welcomes the use of computers in editing. Most of the chapters include suggestions for using the computer, and Chapter 16 summarizes the ways in which computers can assist editors. The book asserts throughout, however, the necessity of human judgments for making editorial decisions and for using electronic assistants.

I would like to acknowledge the assistance of many people. The following reviewed the manuscript: Lynn Beene, University of New Mexico; David K. Farkas, University of Washington; M. Jimmie Killingsworth, Texas A&M University; Jere Mitchum, Tennessee Technological University; Mark Rollins, Ohio University; Doug B. Smith, California Polytechnic State University, San Luis Obispo; Herb Smith, Southern College of Technology; Katherine E. Staples, Austin Community College; Tom Williams, University of Washington; and Kristin Woolever, Northeastern University. David Farkas, Jere Mitchum, and Tom Williams also class tested portions of the book. Steven Auerbach, Elizabeth Bilbro, Debra Clifford, Fred Kemp, and Ernest Mazzatenta read all or parts of the manuscript and offered thoughtful suggestions for revision. The editors at Wadsworth confirmed through their assistance the merits of writer-editor collaboration and proved that the reality of editing can match the ideal. Gerard Bensberg, Kae Hentges, Ken Morgan, Lane Mayon, Carlos Orozco-Castillo, Ellen Peffley, Tony Santangelo, William Stolgitis, and Charles Veazy helped to locate examples. And special thanks to my students and to students in the test classes, who read critically and took seriously their editorial task of helping me shape a book that would be useful and pleasing as well.

Carolyn D. Rude

BRIEF CONTENTS

PART I DEFINITION OF EDITING 1
Chapter 1 Editing: The Big Picture 2
Chapter 2 Readers and Documents 17
PART II COPYEDITING 33
Chapter 3 Copyediting: An Introduction 34
Chapter 4 Copymarking 68
Chapter 5 Spelling, Capitalization, and Abbreviations 89
Chapter 6 Grammar and Usage 106
Chapter 7 Punctuation 125
Chapter 8 Quantitative and Technical Material 158
Chapter 9 Proofreading 180
PART III SUBSTANTIVE EDITING 197
Chapter 10 Substantive Editing: Definition and Process 198
Chapter 11 Style 221
Chapter 12 Organization 258
Chapter 13 Format 281
Chapter 14 Visuals 311
PART IV MANAGEMENT AND PRODUCTION 337
Chapter 15 Collaborating with Writers 338
Chapter 16 Computers as Editorial Assistants 355
Chapter 17 Type and Production 376
Chapter 18 Management 396

CONTENTS

PREFACE XVI

PART I DEFINITION OF EDITING 1

CHAPTER 1 EDITING: THE BIG PICTURE 2

Editorial Responsibilities in Producing the SCRIPT Manual 3
  Project Definition 3
  Employee Supervision and Training 3
  Editorial Review: First Draft 5
  Management: Contracting for Printing 5
  Editorial Review: Second Draft 6
  Field Test 6
  Copyediting 7
  Production 7

Comment: The Editorial Procedure at ACS 7
  Division of Responsibilities 7
  Collaboration 8

Editorial Functions and Responsibilities 8

Management 9
  Project Definition 9
  Acquisition and Selection 9

Scheduling and Coordination 10
Staff Supervision and Training 10
Production 10

Text Editing 11
Substantive Editing 11
Copyediting 12

The "Technical" Part of Technical Editing 13
Technical Subject Matter 13
Technical Genres 14
In-House Setting 14

The Ethics of Technical Editing 14

Qualifications for Technical Editing 15

Summary 16 / Further Reading 16 / Discussion and Application 16

CHAPTER 2 READERS AND DOCUMENTS 17

Purposes for Reading Technical Documents 17
Reading in Order to Act 18
Reading to Get Information 18

Patterns of Reading Technical Documents 19
Reading Selectively 19
Creating Meaning 19
Anticipating Familiar Conventions 20

Comprehending Information: Content, Signals, Noise 21
Content 22
Signals 23
Undesirable Signals: Noise 24

Accessing Information 25

Designing Documents for Use 26

Summary 26 / Further Reading 26 / Discussion and Application 27

PART II COPYEDITING 33

CHAPTER 3 COPYEDITING: AN INTRODUCTION 34

Document Correctness 36

Document Consistency 36

Verbal Consistency 37

Visual Consistency 38

Mechanical Consistency 40

Content Consistency 44

A Foolish Consistency . . . 45

Style Manuals 45

Comprehensive Style Manuals 46

Discipline Style Manuals 46

House or Organization Style Manuals 48

Document Style Sheet 50

Document Accuracy 51

Document Completeness 54

Parts of a Book, Manual, or Long Report 54

Preliminary Pages 55

Body 56

Back Matter 57

Copyediting Visuals 57

Correctness, Consistency, Accuracy, and Completeness 58

Labels, Numbers, and Titles 58

Callouts, Legends, Captions, and Footnotes 60

Placement 61

Quality of Reproduction 62

How to Copyedit 62

Summary 65 / Further Reading 65 / Discussion and Application 65

CHAPTER 4 COPYMARKING 68
The Symbols of Copymarking 69
  Placing the Marks on the Page 69
  Marking Consistently 74
  Distinguishing Marginal Notes from Text Emendations 77
Special Problems of Copymarking 77
  Ambiguous Letters and Symbols 77
  Hyphens and Dashes 78
  Marking Nonprose Text 79
  Marking Visuals 80
Marks for Graphic Design 80
Queries to Writers 81
Summary 85 / Further Reading 85 / Discussion and Application 85

CHAPTER 5 SPELLING, CAPITALIZATION, AND ABBREVIATIONS 89
Spelling 90
  Basic Guidelines and Tools 90
  Frequently Misused Words 95
Capitalization 98
Abbreviations 99
  Identifying Abbreviations 99
  Periods with Abbreviations 100
  Latin Terms 101
  Measurement and Scientific Symbols 101
  States 102
Summary 102 / Further Reading 102 / Discussion and Application 103

CHAPTER 6 GRAMMAR AND USAGE 106
Parts of Speech 107
Parts of a Sentence 110

试读结束，需要全本PDF请购买 www.ertongbook.com

Relationships of Words in Sentences 111
Subjects and Verbs 111
Objects and Complements 114
Pronouns 115
Modifiers 117
Conventions of Usage 119
Quantities and Amounts 119
Relative Pronouns 120
Idiomatic Expressions 120
Summary 121 / Further Reading 121 / Discussion and Application 121

CHAPTER 7 PUNCTUATION 125
Why Bother to Master Punctuation? 126
Basic Sentence Elements 127
Clauses 127
Phrases 128
Conjunctions 129
Relative Pronouns 129
Basic Sentence Patterns and Punctuation 130
Punctuating Simple Sentences 130
Punctuating Compound Sentences 131
Punctuating Complex Sentences 133
Punctuating Compound-Complex Sentences 136
Punctuating Items in a Series/Parallel Structure 136
Punctuation Within Words 141
The Apostrophe 142
The Hyphen 142
Mechanics of Punctuation 146
Quotation Marks 146
Parentheses 146
Commas: Introductory Phrases and Internal Phrases 147
Commas with Adjectives in a Series (Coordinate Adjectives) 147

Dash 148
Colon 148
Ellipsis Points 149
Summary 149 / Further Reading 149 / Discussion and Application 149

CHAPTER 8 QUANTITATIVE AND TECHNICAL MATERIAL 158

Using Numbers 159
Measurement 160
Mathematical Material 161
- *Fractions 161*
- *Equations 162*
- *Copymarking for Typesetting 165*
- *Computer-Assisted Typesetting 167*

Statistics 168
Tables 169
- *General Guidelines 169*
- *Application: Copyediting a Table 170*

Technical Specifications 174
Summary 176 / Further Reading 177 / Discussion and Application 177

CHAPTER 9 PROOFREADING 180

The Value and Goals of Proofreading 182
- *Clean Copy: Eliminating Typos 182*
- *Attractive Copy: Eliminating Spacing and Typographical Errors 184*

Proofreading Marks and Placement on the Page 185
Strategies for Effective Proofreading 190
Summary 193 / Further Reading 194 / Discussion and Application 194

PART III SUBSTANTIVE EDITING 197

CHAPTER 10 SUBSTANTIVE EDITING: DEFINITION AND PROCESS 198

Example: Copyediting vs. Substantive Editing 199
The Process of Substantive Editing 205
  Analyzing the Document's Readers, Purpose, and Uses 206
  Evaluating the Document 207
  Establishing Editing Objectives 207
  Reviewing Your Editing Plans with the Writer 208
  Completing the Editing 208
  Evaluating the Outcome 209
  Reviewing the Edited Document with the Writer 209
Application: The Service Call Memo 209
  Analysis 209
  Evaluation 210
  Establishment of Editing Goals 210
  Evaluation of the Outcome 211
Determining Whether Substantive Editing Is Warranted 215
The Computer in Substantive Editing 216
Summary 218 / Further Reading 218 / Discussion and Application 219

CHAPTER 11 STYLE 221

Definition of Style 222
Example: Analysis of Style 224
Guidelines for Editing for Style 226
Context: Making Style Serve Readers and Purpose 227
Sentence Structures: Making Structure Reinforce Meaning 227
  The Main Idea of the Sentence 228
  "There Are" and "It Is" Sentence Openers 229
  Subordinate Structures for Subordinate Ideas 229
  Parallel Structure 230

S-V-O or S-V-C Word Order 231
Positive vs. Negative Constructions 232
Sentence Length 233
Verbs: Conveying the Action in the Sentence Accurately 234
Action Verbs 234
Strong Verbs 236
Nominalizations 237
Active vs. Passive Voice 237
Words: Using Concrete, Accurate Words 240
Concrete vs. Abstract Nouns 240
Single Words vs. Phrases or Pairs; Simple vs. Complex Words 241
The Language of Discrimination 243
Application: Discriminatory Language 244
Editing for Nonsexist Style 246
Application: Editing for Style 248
Analysis 249
Editing Goals 250
Evaluation and Review 253
Method of Editing for Style 253
Summary 254 / Further Reading 254 / Discussion and Application 254

CHAPTER 12 ORGANIZATION 258
Learning from Text 259
The Schema Theory of Learning 259
Organization and Comprehension 260
Analysis as a Means of Understanding 261
Principles of Organization 262
Pre-established Document Structures 262
General-to-Specific Arrangement 263
Conventional Patterns of Organization 264
Grouping Related Material 265
Parallel Structure for Parallel Sections 269

Application: The Problem Statement for a Research Proposal 269
Summary 277 / Further Reading 277 / Discussion and Application 277

CHAPTER 13 FORMAT 281

Format Options 284
Bases for Format Choices 286
    Reading Complexity 287
    Production Methods 287
Functions of Format 288
    Meeting Reader Expectations 288
    Motivating Readers 292
    Facilitating Ongoing Use 293
    Providing Access to Information 293
    Aiding Comprehension 293
Headings 303
    Wording 303
    Levels of Headings 303
    Frequency of Headings 305
Guidelines for Editing for Format 305
Summary 308 / Further Reading 308 / Discussion and Application 308

CHAPTER 14 VISUALS 311

Reasons to Use Visuals 312
    Conveying Information 312
    Supporting the Text 313
    Enabling Action 314
Types of Visuals 314
Substantive Editing of Visuals 317
    Appropriateness and Number 317
    Match of Form, Content, and Purpose 317
    Arrangement: Sequential and Spatial 318

Emphasis and Detail *319*
Perspective, Size, and Scale *320*
Relationship of Text and Visuals *322*
Discriminatory Language and Good Taste *323*
Application: Cassette Instructions 324
Preparing Visuals for Print 329
Editing Visuals with Computers 331
Summary 333 / Further Reading 333 / Discussion and Application 333

PART IV MANAGEMENT AND PRODUCTION 337

CHAPTER 15 COLLABORATING WITH WRITERS 338
The Editor-Writer Relationship 339
Strategies for Working with Writers 340
Editing Effectively *340*
Managing Efficiently *341*
Developing an Attitude of Professionalism *344*
The Editor-Writer Conference 345
Conference Purpose *345*
Conference Organization *346*
Review of the Edited Typescript *346*
The Language of Good Relationships *347*
Furniture Arrangement *349*
Correspondence with Writers 350
Queries *350*
Letters of Transmittal *351*
Summary 352 / Further Reading 352 / Discussion and Application 352

试读结束，需要全本PDF请购买 www.ertongbook.com