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CAROLYN D. RUDE

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TECHNICAL EDITING

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FOREWORD

by the Series Editor

The Allyn and Bacon Series in Technical Communication is designed for the growing number of students enrolled in undergraduate and graduate programs in technical communication. Such programs offer a wide variety of courses beyond the introductory technical writing course—advanced courses for which fully satisfactory and appropriately focused textbooks have often been impossible to locate. This series will also serve the continuing education needs of professional technical communicators, both those who desire to upgrade or update their own communication abilities as well as those who train or supervise writers, editors, and artists within their organization.

The chief characteristic of the books in this series is their consistent effort to integrate theory and practice. The books offer both research-based and experience-based instruction, describing not only what to do and how to do it but explaining why. The instructors who teach advanced courses and the students who enroll in these courses are looking for more than rigid rules and ad hoc guidelines. They want books that demonstrate theoretical sophistication and a solid foundation in the research of the field as well as pragmatic advice and perceptive applications. Instructors and students will also find these books filled with activities and assignments adaptable to the classroom and to the self-guided learning processes of professional technical communicators.

To operate effectively in the field of technical communication, today's students require extensive training in the creation, analysis, and design of information for both domestic and international audiences, for both paper and electronic environments. The books in the Allyn and Bacon Series address those subjects that are most frequently taught at the undergraduate and graduate levels as a direct response to both the educational needs of students and the practical demands of business and industry. Additional books will be developed for the series in order to satisfy or anticipate changes in writing technologies, academic curricula, and the profession of technical communication.

Sam Dragga
Texas Tech University

PREFACE

Concepts and Goals

Much workplace writing might more accurately be described as editing: compiling, selecting, reorganizing, updating, developing, and redesigning work that already exists in some form. This work may consist of drafts prepared by subject matter experts, related company documents, an existing version that requires new information, or information in secondary sources. Regarded in this sense, editors are information managers, people with a breadth of vision to perceive the possibilities for uses of information; ability to look beyond the existing versions to consider more effective possibilities; ability to gather the necessary information through interviews, secondary sources, databases, or field methods; expertise in the use of language, not just at the sentence and paragraph level but also at the whole-document or document set level; and ability to collaborate with others in developing information products.

This view of editing contrasts sharply with the traditional view of editors as grammar janitors, people who clean up mistakes after someone else has written an otherwise effective document. It is an ambitious view that demands a sophisticated sense of the uses of information in the workplace and how this information becomes available for use through thoughtful choices of media, content, structure, and design. Editors remain expert on grammar and mechanics, but they offer so much more: analysis, evaluation, imagination, and good judgment applied to information design and management.

This edition of *Technical Editing*, like its predecessors, aims to prepare students comprehensively for editing tasks in technical and other professional environments. One goal is to develop in students a rich appreciation (1) for the ways in which documents enable solutions to problems; (2) for the variety of options that editors can choose for documents; and (3) for the complex nature of language and communication and the expertise required to use information well. Students should be able to make choices about documents that are well grounded in an understanding of how users will respond. They also understand and can use the principles of organization, visual design, and style that are an editor's design tools. Although *Technical Editing* does not merely rehearse rules, it does review principles of grammar, punctuation, style, organization, and visual design so that editors will understand how all of these text features may be used to clarify meaning, to persuade, to make information easy to locate, or to encourage the accurate completion of a task.

Perhaps subtly, the themes of professionalism and respect permeate this textbook. Professionalism means taking responsibility for doing well: knowing one's

area of specialization, including its vocabulary, and not just guessing or editing by preference; working well with colleagues; and doing quality work on time. Professionalism also means responsibility to users and to ethical standards. A professional person uses critical judgment and does not merely accept what he is given. A professional person offers respect to others: to users, to colleagues, to subject matter experts, to writers, to support staff. Self-respect matters, too—it is based on the editor's confidence that she has something of value to contribute to a project.

Revisions for the Third Edition

Exciting changes in technology continue to change editorial procedures. Technology offers new options for publication, specifically the World Wide Web, corporate intranets, and online help. It makes possible the generation of documents in multiple forms from databases of information. It has changed the process of production from a print-based process with commercial vendors to an increasingly desktop operation. The main substantive changes to this edition relate to technology. A new chapter on electronic editing (Chapter 6) provides specific guidance for using some of the available tools, as well as research-based discussion of best practices in the field. Chapter 5, on soft-copy editing, is substantially updated to include discussion of XML and cascading style sheets as they relate to websites and single-source documentation. The discussion of markup languages in Chapter 5 has expanded to show more clearly the relationship between markup and information management. Chapter 23 on type and production incorporates new information about digital illustrations and printing. The importance of globalization has warranted a dedicated chapter, Chapter 20, on editing for global contexts.

For the two new chapters (6 and 20), I welcome two contributing authors: David Dayton, who has written Chapter 6, "Electronic Editing," and Bruce Maylath, who has written Chapter 20, "Editing for Global Contexts." Both offer expertise in these topics that exceeds my own and a fresh, up-do-date examination of technological and global issues as they affect editing.

This edition remains structured to suggest an increasing level of responsibility in editorial tasks, from basic copyediting to comprehensive editing. However, the sections on basic copyediting and comprehensive editing are sufficiently self-contained that an instructor may choose to assign the comprehensive editing chapters at the beginning of the term in order to give students a broad perspective on editorial responsibility.

One change in structure will be noticeable to people who have used previous editions: the chapter on working with writers has moved from the back of the textbook, in the section on management, to the front, where it joins chapters on editors and readers. Whatever the editor does to the text, those actions are influenced by and influence people—writers as well as users. The triumvirate of writer, reader, and editor is now complete in the opening section. I hope that this move will substantiate the connectedness of editorial choices to human beings and encourage beginning editors to edit with respect for writers as well as readers. Another structural change is the grouping in Part 2 of three methods chapters, two of them featuring electronic copy.

In addition to the large-scale revisions relating to technology and globalization and some reorganization, the third edition incorporates many little changes that aim to improve the text pedagogically. For example, a four-part taxonomy of functions in the chapter on illustrations is now a more memorable three-part taxonomy, the chapter on management includes a new discussion of evaluation, and the tables of proofreading and copyediting marks have been clarified. Suggested materials for further reading have been updated, especially with the addition of online resources.

Audience, Pedagogical Methods, and Structure

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 basic textbook or handbook. The chapters refresh students' vocabularies so they can talk about their editorial choices using the language of the profession. Chapter activities and assignments at the Allyn & Bacon/Longman website (www.ablongman.com/rude) support teaching in computer classrooms and online editing as well as providing documents to download for hard-copy editing. The glossary reinforces the premise that professional technical communicators master the vocabulary of their discipline.

Scenarios, examples, illustrations, discussion questions, and applications complement explanations to enhance learning. Tables summarizing key points in chapters on copyediting enable ready reference. An accompanying instructor's manual and website provide workplace documents correlated to chapters so that students can apply the principles that the chapters discuss without the distraction of other editorial needs.

The book is organized to parallel the typical career path of editors. Just as editors prove themselves as copyeditors before they accept responsibility for comprehensive editing, so does this book teach copyediting before the more complex and less structured principles of comprehensive editing and management. This structure also facilitates the use of the book in two quarters or semesters with the first term devoted to copyediting and the second to comprehensive editing. The modular character of the book, however, enables a top-down approach, with issues of comprehensive editing preceding the review of copyediting.

Part 1, *People and Purposes*, includes introductory material. The first chapter illustrates the breadth and diversity of editorial responsibilities through scenarios and discussion. The second chapter explains what readers and users do with documents—the basis for editorial choices beyond adherence to rules. Chapter 3 positions the editor in a working relationship with the writer or subject matter expert.

Part 2, *Methods and Tools*, shows students how to mark copy both on paper and online. It also describes the procedures and tools available for electronic editing.

Part 3, *Basic Copyediting*, covers editorial choices that make a document conform to language standards, including grammar, punctuation, and consistency. It

explains those standards in the context of a reader's need to understand, locate, and act.

Part 4, *Comprehensive Editing*, offers an analytical process and principles for evaluating style, organization, and the visual features of a text, whether printed or online. Editors learn to look at whole documents and imagine their use by readers so that they can guide decisions about these high-level features of documents. Teachers who prefer the comprehensive approach to editing or whose students are skilled in basic copyediting can assign Part 4 directly after Parts 1 and 2, using Part 3 for reference as needed.

Part 5, *Management and Production*, takes students into the workplace to consider legal and ethical issues of publication and methods of production and management.

Instructor's Manual and Website

Ancillary materials—an instructor's manual and a website—support instructors in using the textbook for a course.

The instructor's manual includes four sections:

- Discussion of the philosophy and pedagogy of the editing course. This section will help you conceptualize your own course and the methods you will use.
- Options for a course syllabus and statement of objectives. This section will help you plan the specific structure and requirements of your course.
- Chapter notes. This section offers suggestions for approaching each chapter. It also includes possible responses to the Discussion and Application activities following each chapter.
- Worksheets, copyediting assignments, and transparency masters. This section includes materials that can be photocopied for a course workbook, including longer documents for practicing copyediting than the textbook activities provide. Marked documents can be made into transparencies for discussion in class. A sample exam testing knowledge of grammar and punctuation is also available.

To request a copy of the Instructor's Manual, call 1-800-852-8024, or contact your Allyn & Bacon/Longman sales representative. (Go to www.ablongman.com/replocator/ to find contact information for your representative.)

The course website (www.ablongman.com/rude) provides additional supplementary materials not included in the Instructor's Manual and materials that support electronic editing as well as completion of some activities at the computer. The website includes these sections:

- Discussion and Application worksheets. These documents replicate the end-of-chapter activities in the textbook, but they can be reproduced for a workbook or downloaded to computer workstations so that students do not have to write in their books. They are available both in a print version (for a workbook) and an online version (for completion at the computer).

- Supplementary instructional materials. Principles of grammar and style are reviewed in slide shows in more detail than they are discussed in the text. For example, one show discusses dangling modifiers, and another distinguishes “although, but, and however” as connectors with similar meaning but different effects on sentence structure and punctuation. Two tutorials on advanced features of Microsoft Word help students develop skills for electronic editing.
- Documents for editing practice. Documents that are longer than those in the Instructor’s Manual and suitable for comprehensive editing are available for download.
- Internet resources for editors. A list of sites with descriptions will help editors keep up to date on technology and locate reference materials.

Acknowledgments

Many people have helped make the third edition a better edition than its predecessors, but I especially would like to thank students for their suggestions. My own students have helped me understand users of this textbook both by their responses to it and by their explicit suggestions. They also class-tested Chapter 6, as did students of Professor Kelli Cargile-Cook at Utah State University. Professor Ann Blakeslee’s students at Eastern Michigan University—Elizabeth Donoghue Colvin, Rhonda L. Copeland, and Lisa Tallman—wrote extensive reviews of the second edition. A number of students from various colleges and universities have contacted me by email with suggestions or with requests for clarification. I have listened to them all. I will continue to welcome such suggestions for future editions of the textbook.

Reviewers of the second edition have included Marian G. Barchilon, Ann Blakeslee, Deborah S. Bosley, Melody DeMeritt, Laura Gurak, Phil Hey, Russel Hirst, and Sandra Harner. Ann Jennings has been a careful reader who has helped me with many details, and Robert Lynch and Glenn Sanders also provided suggestions. Sam Dragga, the Allyn & Bacon series editor, read the new chapters thoughtfully, and Eben Ludlow, vice president at Longman, offered courteous advice about chapter development. Laura Palmer, a graphic designer, contributed to Chapter 23. Robin Lee, my former student and now an editor for Cisco Systems, spent valuable time showing me her processes for editing at a distance and for commenting within FrameMaker files. Tim Hadley proofread with a remarkable eye for detail.

I continue to benefit from the assistance of Paula Green, Kathy Klimpel, and Charlene Strickland, who provided insight into editorial practice in the scenarios for Chapter 1 beginning with the second edition. I continue to use examples provided for previous editions by Steven Auerbach, Kae Hentges, Ken Morgan, Lane Mayon, Carlos Orozco-Castillo, Ellen Peffley, Tony Santangelo, and William Stolitigis. Love and appreciation to my husband and son, Don and Jonathan, who patiently supported me while a book took priority for time.

C. D. R.

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