

# Australian standards for editing practice

Second edition

IPEd.

To advance the  
profession of editing

**Institute of Professional Editors Limited**

First published 2001 by Council of Australian Societies of Editors (CASE)  
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Second edition published 2013 by  
Institute of Professional Editors Limited (IPEd)  
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Design and layout by Graham Abraham Design  
Printed in Australia by Eureka Printing Pty Ltd

The *Standards* are available from the organisations below.

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\* The postnominals DE (distinguished editor) and AE (accredited editor) were instituted by IPEd in 2008. They have been included with the names of members of earlier working groups. The postnominal ELS (Editor in the Life Sciences) is awarded by the Board of Editors in the Life Sciences (BELS), an international organisation established in 1991.

## Revision history

The first edition of *Australian standards for editing practice* was devised by the Standards Working Group of the Council of Australian Societies of Editors (CASE), approved by the members of all Australian societies of editors and ratified by CASE in 2001.

CASE was an informal national body that brought together the seven Australian societies of editors to work on projects of common interest. The successor to CASE, the Institute of Professional Editors Limited (IPEd), a not-for-profit company, was established in 2008 as the peak national body for Australian editors.

This revised edition is the result of the efforts of three working groups, the first in 2005–2006. The 2010–2011 working group, comprising members of the Canberra Society of Editors, consulted with members of the other Australian societies of editors through IPEd Council and the committees of IPEd's member societies.

In 2011, IPEd appointed a facilitator to consult with all Australian societies of editors, through their committees and a series of workshops, in a process similar to that used for the preparation of the original edition of the *Standards*. After the workshops, each society appointed a coordinator; together the coordinators and facilitator devised the final revision through national teleconferences and consultation with their workshop participants. The resulting document was submitted to IPEd Council and approved by the members of all Australian societies of editors in August 2012.

## Acknowledgements

The standards working groups, from inception to this 2011–2012 review, acknowledge the assistance of the Editors' Association of Canada (EAC), whose published *Standards* have guided both the process and the output.

The 2011–2012 working group especially acknowledges that it has drawn heavily on the preface and introduction to the 2009 edition of EAC's *Professional editorial standards*.

## Foreword

Never have able wordsmiths – the minders, or keepers, of language – been more needed. Communication has become more abundant, more widespread, faster and more deeply ingrained in our lives. Access to an array of media is wider than it has ever been, and ideas and language innovations are burgeoning. Sometimes, though, ideas are marred by the speed and ease in which they can be delivered, leading to miscommunication, a lack of clarity and a lack of elegance.

Editors are correspondingly more indispensable. Working within this realm, they need solid grounding, logical thinking and a breadth of understanding of how published language and communication work. And they need a functional grasp of an increasing range of subject areas.

This second edition of *Australian standards for editing practice*, published by the Institute of Professional Editors Limited (IPEd), the peak body for Australian editors and societies of editors, gives a solid frame to the range of knowledge and skills that competent editors possess. It includes the understanding of new technology and the flexibility to embrace new media, new rules and new language, among the many other factors that enhance clear communication.

IPEd has done a fine job in reviewing the original edition to produce a timely and well-crafted document to guide new and experienced editors, their educators and their clients. This book brings together a special wisdom and care for our language – especially as it is used in Australia – combined with experience of working with Australian English in the professional domain. Our language has moved on since the first edition. We need a reference work that is up to date.

As with the first edition, published in 2001, the second results from the teamwork of many Australian editors, to whom their colleagues are deeply indebted. Capably led by Kerry Davies AE, editors from all of IPEd's member societies worked for more than a year to revise, review and refine the *Standards*. Others contributed to meetings and discussions about the revision in their local societies. These editors generously gave time and effort to the project; they brought their intelligence and negotiating skills to the task. Writers and readers, and the editors whose work benefits both those groups, are in their debt.

**Emeritus Professor Roland Sussex OAM**

Patron, Institute of Professional Editors Limited

February 2013

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2. The nature and tone of written materials; see also *voice* (D2.2).
3. Type formats (size, font and so on) and spacing for elements of a publication that are applied consistently through a style template or design brief (A6.1, E2.7, E4.1).

**style guide:** A handbook, usually developed by an organisation for general in-house use or for a particular series of publications, detailing points of editorial *style* (*def. 1*).

**style manual:** A published work developed for general use by authors, editors and printers, detailing points of editorial *style* (*def. 1*).

**style sheet:** A list, usually alphabetical, developed by an editor during the course of an edit, detailing points of editorial *style* (*def. 1*) for a particular publication or series.

**substantive editing:** Editing to assess and shape material to improve its organisation and content, to clarify meaning, improve flow and smooth language, ensuring that language use is appropriate to the nature of the material and its audience; includes *structural editing*.

**textual device:** Device for adding emphasis to a piece of writing, including formatting, punctuation, sentence structure and the arrangement of words.

**usability:** The ease with which a publication, especially a website, can be navigated and used by its audience (E1.3, E2.3). See also *accessibility*, *functionality*.

**verification editing:** Checking that material is consistent, accurate and complete; may include elements of *proofreading* and *copyediting*.

**version control:** A system of file-management conventions used to record different versions of a document.

**voice:** 1. The level and *style* (*def. 2*) of language appropriate to the nature of the material and its audience (D2.2). 2. The representation of characters, especially in fiction, through the *style* (*def. 2*) of language ascribed to them (D2.2).

**online:** Any material that is accessed through a website.

**onscreen:** Any material that appears on a computer screen or other electronic device.

**parallel structure:** Consistent use of a grammatical form for equal clauses within a sentence or for items in a list.

**plagiarism:** Appropriation or close imitation of other people's writing or ideas without acknowledgement (A4.1).

**preliminary matter:** Material that precedes the first page of the *body*, which, for printed publications, may include title page, *imprint page*, dedication, foreword, contents, lists of illustrations and abbreviations, preface, acknowledgements, abstract and summary; commonly known as the 'prelims'. For *onscreen* materials, entry sequence may include splash screen and home page.

**proof checking:** Checking of various types of proof during the printing process.

**proofreading:** Examination of material after layout to correct errors in textual and visual elements. See also *verification editing*.

**reference:** See *citation*.

**sample setting:** Material selected as representative of the elements of a publication, such as levels of heading, list *formats* (*def. 3*), boxed text and other design elements, and headers and footers, as part of the design brief.

**slander:** See *libel*.

**source:** See *citation*.

**structural editing:** An aspect of *substantive editing* that focuses on the organisation of material and the types of elements included to clarify meaning and improve flow.

**style:** 1. Decisions made about punctuation, capitalisation, spelling, formatting of lists and tables, presentation of numbers, abbreviations and so on that are applied consistently throughout a document or series, usually through a *style sheet*, *style guide* or *style manual* (A6.5, E2.1, E2.7).

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# Preface

*Australian standards for editing practice* sets out the core standards that professional editors should meet and tells employers what to expect from the editors they hire. It shows new editors the range of skills and knowledge they should aspire to. It helps the Institute of Professional Editors (IPEd), educational institutions and other training providers to devise material, seminars and courses on editing. And it is the foundation for IPEd's national accreditation of editors.

*Australian standards for editing practice* does not attempt to capture the full array of knowledge, skills, best practice, sequential tasks and responsibilities required by all editors on all projects in all settings. However, professional editors should meet certain core standards.

The term 'standard' is used here to mean 'anything taken by general consent as a basis of comparison; an approved model' (*Macquarie dictionary*). *Australian standards for editing practice* does not attempt to codify the quality of editors' work – how well a particular task has been performed. Rather, it aims to set out the knowledge and skills needed for editing practice, those that experienced editors routinely use in their work.

**end matter:** Material that follows the last page of the *body*; may include glossary, appendixes, acknowledgements, reference list and index.

**format:** 1. Shape and size of a book (A5). 2. Particular way information is coded for computers (A6.3, A6.4). 3. Particular design elements, list *styles* (*def. 1*) and type *styles* (*def. 3*) used in a publication (A1.1, A2.3, A5, A6.4, C2.2, E4). 4. Medium of publication (A4.1, A5, C1.5).

**front matter:** See *preliminary matter*.

**functionality:** Performance efficiency of an online publication, and its reliability on different platforms and browsers (E1.4). See also *accessibility, usability*.

**imprint page:** Page within *preliminary matter* that gives details of the publication and the publisher.

**inclusive language:** Language free of bias.

**intellectual property:** Original material produced by a writer or other creator that is protected by *copyright* law (A4.1).

**international standard book number (ISBN):** Part of a worldwide system of cataloguing books.

**international standard serial number (ISSN):** Part of a worldwide system of cataloguing journals and other series of publications.

**legal deposit:** Legal requirement to lodge works that are catalogued with an *ISBN* or *ISSN* in national and state libraries.

**libel:** Statement that damages a person's or an organisation's reputation (A4.1). See also *defamation*.

**line editing:** See *copyediting*.

**macro:** A computer program that can be used to automate procedures in applications such as word-processing software (A6.1).

**metadata:** Information describing the content of an item such as an electronic file; may include title, description and keywords (C2.8).

**moral right:** Right of creators of works that are protected by *copyright* law (A4.1).

## Glossary

**accessibility:** Ease of information retrieval (A1.2, A2.3, A7.5, C1.3, D5.6, D6.11, E1.3, E2.3). 1. Technological access, as through a network or the internet. 2. Cognitive access, such that information is easily read. 3. Ease of access for people with disability. See also *functionality*, *usability*.

**alt text:** Alternative text that identifies the content of an image (other than purely decorative images) used in onscreen materials to ensure *accessibility* (def. 3) (D6.11, E3.1).

**back matter:** See *end matter*.

**body:** Material that follows the *preliminary matter* and precedes the *end matter*, which may be organised into parts, chapters, sections and subsections; may include tables and illustrations, captions, labels and notes.

**cataloguing-in-publication (CIP) data:** Part of an international system of cataloguing publications (A4.4).

**citation:** Method of properly accrediting sources, often through an accepted academic method using footnotes or endnotes and a reference list.

**copyediting:** Editing to ensure consistency, accuracy and completeness; also called line editing. See also *verification editing*.

**copyright:** Legal concept giving the creator or commissioner of an original work exclusive rights to it.

**credit:** Acknowledgement of a source, as an in-text reference, as part of a caption or in a list in *preliminary matter* or *end matter*.

**defamation:** Written or spoken statement that damages a person's or an organisation's reputation (A4.1). See also *libel*.

**diacritic:** A symbol added to a letter in a foreign word, such as the various types of accent, which affects its pronunciation.

**dramatis personae:** List of main characters in a dramatic work.

**electronic:** See *online*, *onscreen*.

The standards in this document are divided into five parts:

- A. Professional practice
- B. Management and liaison
- C. Substance and structure
- D. Language and illustrations
- E. Completeness and consistency.

The standards set out in Part A underpin those in Parts B to E. Editors who meet the standards given in this document are able to do a professional job with a minimum of supervision.

This document is genre neutral; that is, it describes the knowledge and skills required of editors regardless of the type of material they work on or the organisational context they work in.

*Australian standards for editing practice* recognises the most recent version of the *Style manual for authors, editors and printers* as the standard Australian editorial reference.

# The fundamentals of editing

Editing involves carefully reviewing material before it is published, and suggesting or making changes to correct and improve it.

Three aspects, or levels, of editing are generally recognised – substantive editing, copyediting and proofreading.

- Substantive editing (including, and sometimes called, structural editing) is assessing and shaping material to improve its organisation and content. It is editing to clarify meaning, improve flow and smooth language.
- Copyediting is editing to ensure consistency, accuracy and completeness.
- Proofreading is examining material after layout to correct errors in textual and visual elements.

In practice, not all editors work on all of these aspects, and not all publications go through them all. Further, some overlap is inevitable. The exact editorial process followed for a given publication varies, depending on factors such as the quality of the original material, the intended audience and purpose, set practices within an organisation, production methods and tools, schedule and budget.

*Australian standards for editing practice* emphasises the place of editors' work in the context of the entire publishing process. The practice of editing is not confined to working with specific written materials in isolation. For example, an editor's capabilities may extend to project management, using the same skill set needed in managing any job and dealing with the other people involved. Although editors generally do not need the design and layout abilities of a desktop publisher, they need to understand what a desktop publisher can do.

- E2.6** Preparation of copy for preliminary material, headers or footers, covers and spine, if required.
- E2.7** Assessment of index for length, content and accuracy, and conformity to style.

## E3 Illustrations

**Editors need to understand what can and cannot be done with illustrations. At a minimum, editors ensure that a publication presents:**

- E3.1** Illustrations, where required, that are consistent, accurate, complete and relevant.  
*Includes captions, labels and legends; for onscreen materials, also includes the content of link titles and alt text.*
- E3.2** Consistency between text and non-text elements.

## E4 Format, layout and production

**Editors should be familiar with proofreading strategies to check the following elements of a publication:**

- E4.1** Format and layout against design specifications.  
*Includes type sizes and styles, line lengths, alignment, leading, heading hierarchy, weights of rules and other design features.*
- E4.2** Layout to correct problems, including widows and orphans; rivers of space; awkward breaks in words, lines, tables and lists; and incorrect placement of design features and illustrations.
- E4.3** Page numbers and headers or footers.
- E4.4** Page and production proofs and binding.

## E2 Textual elements

To ensure the consistency of the language and internal structures of the text, editors check them against external and internal style references. Editors use the following tools, methods and elements to maintain consistency, accuracy and completeness:

- E2.1** An editing style sheet specific to the publication to ensure a consistent approach to textual elements such as:
- spelling, grammar, punctuation, capitalisation, hyphenation, abbreviations and italics
  - style of numbers, dates, percentages, symbols and equations
  - structure, grammar and punctuation of lists, including nested lists
  - heading hierarchy
  - chronology, descriptions, names and terms
  - alphabetical and numerical sequences.

*Alphabetical sequences apply to bibliographies, glossaries and indexes; numerical sequences apply to chapters, paragraphs, sections, pages, footnotes, illustrations and tables.*

- E2.2** Explanations of symbols, terms and shortened forms, when required and placed appropriately.

- E2.3** Lists that help readers find information efficiently.

*Includes lists of contents, abbreviations, illustrations, tables, cross-references, dramatis personae and links in onscreen publications.*

- E2.4** Identification and review of statements where content seems to require checking.

- E2.5** Referencing that is consistent, accurate and complete.

*Includes acknowledgements, citations, bibliography, list of references, endnotes, footnotes, margin notes, cross-references, URLs (website addresses), glossary and index.*

## The role of editors

Editors are central to any publishing project; they endeavour to reconcile the needs of the author, the audience and the publisher.

Editors are part of a team that guides a work through its various stages from creation to publication. All editors need to have a broad understanding of the publishing process and their role within it, regardless of the extent of their involvement. They should demonstrate initiative and flexibility, adapting to the needs of a project and the specific work environment. They need to communicate clearly and tactfully, and to respect the opinions of others.

Editors work with many different subjects and many types of publication (novels, reports, websites, magazines, textbooks and scientific materials, to name a few) that require specialised knowledge and skills. Editors also work in many different contexts, from book editing for traditional publishing houses to advising on communication strategies in government and corporate sectors. Some editors perform tasks that extend beyond editing, such as project management, design, indexing and website maintenance.

The goal of editors, regardless of their role or the type of publication, is to ensure that the material is consistent and correct, and that its content, language, style and layout suit its purpose and meet the needs of its audience.

## E. Completeness and consistency

Editors ensure that elements of a publication are complete, consistent and correctly placed. They also test onscreen publications for usability and functionality.

### E1 Integrity

**To ensure that a publication is complete and consistent, editors are required to check:**

- E1.1** Completeness of the various components of a publication, ensuring that they are accurate and in proper sequence.
- E1.2** Accuracy of cross-references, citations and links:
  - within the text
  - between the text and illustrations and tables
  - between the contents page and the headings, text and page numbers
  - between the lists of illustrations and tables in the preliminary matter and the illustrations and tables.
- E1.3** Usability of onscreen materials, by testing:
  - navigation, including structure, links and menus
  - usability of all interactive elements
  - compliance with accessibility standards.
- E1.4** Functionality of online publications, by testing for:
  - performance, download time and interactivity (aspects designed to elicit responses)
  - functionality using different platforms and browsers.

## D6 Illustrations

'Illustrations' is used in the widest sense to include all non-text elements, such as drawings, cartoons, diagrams, charts, graphs, maps, photographs, computer-generated graphics, slideshows and multimedia files. Editors require knowledge of the following:

- D6.1 Principles of presenting information in visual form.
- D6.2 Styles of illustration appropriate to a publication.
- D6.3 Need for additional illustrations.
- D6.4 Most effective positioning of illustrations.
- D6.5 Requirement for captions and acknowledgements.
- D6.6 Different types of graphs and charts, and their uses.
- D6.7 Conventions governing the use of graphs, including correct use of their various elements, such as axes, scales and labels.
- D6.8 Conventions governing the use of the various types of maps and their elements, such as labels, boundaries, contours, scale, legend and orientation.
- D6.9 Principles of clear, logical and effective structure and layout of the parts of a table.
- D6.10 Technical quality of illustrations.  
*Includes resolution, clarity, file size and tonal contrast.*
- D6.11 Accessibility requirements for onscreen materials.  
*For example, all images, other than purely decorative ones, require alternative text (alt text), which identifies the content of an image.*

## A. Professional practice

Editors are part of a larger publishing process; they understand the stages of that process and the standard practices of the publishing industry, whether for printed or onscreen publications.

### A1 Professional knowledge and conduct

Regardless of their role in the publishing process or the organisational context, editors need to understand the following:

- A1.1 Steps in the publishing process, the relationship between them and their effect on the final publication.  
*Includes publication planning, budgeting, editing, designing, formatting or typesetting, proofreading, navigation, indexing, print production (such as production checking, binding and distribution), online procedures (such as programming, testing, site maintenance and uploading or replication) and marketing.*
- A1.2 Different types of publication, their purpose and audience, and the editing and production choices that these imply.  
*Includes implications for accessibility, cost, scheduling, production, marketing and delivery modes.*
- A1.3 Components of a publication appropriate to the delivery medium, which may include preliminary matter, body, and end matter.
- A1.4 The need to balance time, cost and quality to suit the purpose of a publication, and the effect of choices in any of these on the final product.
- A1.5 Professional ethics.  
*Includes objectivity, confidentiality, conflict of interest and implications for editing academic material such as theses. (When editing a thesis, comply with the IPed 'Guidelines for editing research theses', available at [iped-editors.org](http://iped-editors.org).)*

- A1.6** Standard business practices in the publishing and communication industries, whether as a freelancer or as an in-house editor responsible for contracting work.

*Includes knowledge of acceptable rates and methods of quoting; types of contracts and conditions; and the different types of insurance that may be required (such as public liability and professional indemnity) and the circumstances under which insurance may or may not be necessary.*

- A1.7** The need for ongoing professional development.

*Before undertaking a project, editors should ensure that they have the skills, training and experience necessary to complete the work. They should also recognise when they need to acquire and apply specialised knowledge from other sources or professions. Editors should improve and upgrade their knowledge and skills throughout their careers.*

## A2 Communication

**Competent editors have the required skills to communicate clearly and diplomatically with clients and colleagues. They understand and can apply the following:**

- A2.1** Principles of clear writing.

- A2.2** Principles of structuring material for printed and onscreen publications.

- A2.3** Principles of accessibility – the ways in which people access and absorb information.

*Includes access for people with disability; links between design and substance; media, formats and typography; and legibility and readability.*

- A2.4** Conventions of spelling, punctuation, grammar and usage in Australia, and evolving trends in language usage nationally and internationally.

## D4 Spelling and punctuation

**English spelling and punctuation vary in different regions of the world. Editors are required to know the following:**

- D4.1** Australian spelling and punctuation, and acceptable options in both, in texts for Australian publication.

- D4.2** Word usage, spelling and punctuation used in other English-speaking cultures as appropriate.

## D5 Specialised material

**Punctuation, spelling and word choices in specialised material must be defensible and coherent. Editors working with such material require relevant knowledge and skill in the following:**

- D5.1** Forms and protocols associated with the language and display of specialised material.

*Includes fiction, poetry, music, drama, academic writing, government reports, web content, mathematics and scientific notation.*

- D5.2** The extent to which an academic thesis may be edited and the nature of the edit.

*Refer to the 'Guidelines for editing research theses' at [iped-editors.org](http://iped-editors.org).*

- D5.3** Technical and specialised terms, with the ability to explain them for the intended audience.

- D5.4** Conventions for expressing foreign and historical currencies and units of measurement, and methods of conversion.

- D5.5** Diacritics for foreign words, and other letter conventions.

*Includes symbols added to letters, such as the various types of accent, and ligatures or tied letters.*

- D5.6** Techniques available to help potential readers to find web content, such as search engine optimisation (SEO).

## D2 Voice and tone

**In improving a sentence, paragraph or passage, editors change only what is necessary to establish and preserve consistency in the following:**

**D2.1** Reading level, degree of formality (register) and use of terminology appropriate to the type of publication and audience.

**D2.2** Voice (or voices), colour and tone.

*Refers to the level and style of language appropriate to the nature of the material and its audience; alternatively, especially in fiction, the representation of characters through the style of language ascribed to them.*

## D3 Grammar and usage

**Editors do not introduce new errors and do not alter the intended meaning. To ensure consistency, accuracy and completeness, editors are required to know the following:**

**D3.1** Conventions of English grammar and syntax in different genres.

**D3.2** Words and their meanings.

**D3.3** Conventions governing:

- expression of numbers, dates, percentages, measurements and statistical data
- use of italics, capitalisation, bolding, underscoring, angle brackets, hyphenation, symbols and shortened forms
- list formatting
- citation of sources and quoted material in academic and non-academic text.

**A2.5** Respective roles of editor, author and client in decision making.

*A client, whether an individual, a group of individuals or an organisation, is the entity to which an editor is answerable for a publishing project. The client may or may not be the author.*

**A2.6** Negotiation techniques to apply when differences of opinion occur, and understanding of when to bring in an appropriate arbiter.

## A3 The publishing process

**Regardless of the extent of their involvement in the publishing process, editors require understanding of the following:**

**A3.1** Scope of the briefing process for the publishing team.

*Expertise required of the publishing team may include project management, editing, design, illustration, photography, electronic publishing, word processing, typesetting, proofreading, indexing, prepress, printing, web maintenance and marketing.*

**A3.2** Technology used in the industry and the terminology that describes it.

**A3.3** Role of the editor in a publishing project, and the importance of properly defined responsibilities, accountabilities and authorities.

**A3.4** Levels of editorial intervention required for various publications.

**A3.5** Stages of the editing and proofreading process, including which stages need to be repeated to ensure consistency.

## A4 Legal and ethical matters

**The publisher is responsible for ensuring that a publication meets all legal requirements, but the editor should alert the publisher at the earliest opportunity to any possible legal problems. In particular, editors require knowledge of the following:**

- A4.1** Legal and ethical dimensions of the publishing process, and their implications for a publication.

*Includes libel, defamation, obscenity, discriminatory language, cultural sensitivity, intellectual property, plagiarism, moral rights and copyright, privacy and confidentiality, visibility of material, the ease with which material can be copied and republished in other formats, and different copyright protections available in Australia and other countries.*

- A4.2** When legal advice on implications for publishing should be sought.

*Includes legislation relating to copyright and digital rights; trade practices and trademarks; privacy and freedom of information; social justice, access and equity; sub judice matters; and parliamentary privilege.*

- A4.3** The information that is required to appear in a publication.

*May include the publisher's name and address, acknowledgements, credits and copyright notices.*

- A4.4** Legal deposit requirements and registration practices.

*Includes cataloguing-in-publication (CIP) data, international standard book number (ISBN) and international standard serial number (ISSN).*

- A4.5** Permissions required for reproduction, and the procedures and responsibilities for obtaining permission.

- A4.6** When it is appropriate to remove, amend or flag potentially biased, non-inclusive or offensive material.

## D. Language and illustrations

Editors ensure that the elements of a publication are suitable for its purpose, taking into consideration the intended audience, author's intention, available resources and type of publication. This section describes what an editor must know and do to ensure that the language and illustrations of a publication are appropriate for its purpose.

### D1 Clarity

**A major purpose of editing is to make the mechanics of presentation inconspicuous so as not to distract the reader. The principal areas dealt with by the editor to ensure clarity are the following:**

- D1.1** Principles of clear expression.

*For example, the use of plain English to avoid ambiguity, verbosity and needless repetition; replacing the general and abstract with the specific and concrete; replacing noun strings; and eliminating clichés and euphemisms.*

- D1.2** Clear and logical connections between phrases, clauses, sentences, paragraphs and sections.

*For example, editors use subordinate structures for subordinate ideas, replace negative constructions with affirmative ones, and employ parallel grammatical structures to create smooth links.*

- D1.3** Punctuation to ensure clarity of meaning and ease of reading.

## C2 Structural devices

Editors ensure that publications are effective and suitable for the intended audience by identifying the quality required and using various techniques to achieve the following:

- C2.1** A complete, coherent and balanced publication, restructuring, rewording, adding and deleting material where necessary.
- C2.2** Appropriate form of presentation, rewriting or reformatting material where necessary.  
*For example, material in tabular form may be better presented as part of the text; dialogue as narrative text; number-laden text as a chart or table; a descriptive passage as a diagram; or a lengthy digression as dialogue or an appendix. Paragraphing, emphasis, lists and illustrations may also help to clarify the material.*
- C2.3** Cohesive and varied paragraphs and sentences, reordering where necessary.
- C2.4** Relevant, logically graded and consistent headings and other labelling devices appropriate to the publication and medium, and accurately reflecting the content to which they apply.  
*Includes menus, buttons, electronic links, margin notes, headers and footers.*
- C2.5** Ease of navigation, using cross-references or electronic links to guide readers through a publication.
- C2.6** Effective use of supplementary material, requesting or creating new material if required.  
*Includes maps, tables, figures, glossary, index and further reading list.*
- C2.7** Appropriate referencing.  
*Includes citations, bibliography, list of references, endnotes, footnotes, margin notes, cross-references, glossary and index.*
- C2.8** Effective summaries for meaning, adding lists, abstracts and metadata to help readers understand a publication's content.  
*Metadata includes title, description and keywords associated with a file.*

## A5 Design, typography and formatting

Editors understand the following design, typography and formatting concepts, and recognise when professional design input is appropriate:

- A5.1** Use of design elements to convey meaning and enhance readability.  
*For example, use of fonts, layout and colour.*
- A5.2** Effect of typography and layout on readability in different media. Typographical characteristics include:
- alignment
  - use of appropriate typefaces for different purposes (for example, printed and onscreen publications)
  - use of white space and margins
  - use and effect of kerning
  - fonts, text size, leading and weight
  - capitalisation
  - line and column widths
  - colour (for example, visibility for people who perceive colour differently).
- A5.3** Requirements associated with illustrations (see D6 for a full definition) in different media.  
*Includes techniques for best fit in the space available and correct placement in the final publication.*

## A6 Tools and software for editing practice

**Editors use resources to help ensure consistency and to communicate suggested changes to the client. Editors should be up to date and proficient in the following:**

### A6.1 Common word-processing software for editing.

*Includes use and development of templates, styles, revision mark-up (comments, track changes), tables of contents, footnotes and endnotes, macros, find and replace functions, and spellcheck.*

### A6.2 Accepted techniques for handling electronic files.

*Includes backing up, virus scanning, transmitting and receiving files, converting and saving files, archiving and version control (incorporating date and time, stage of editing and editor identification).*

### A6.3 Principles and requirements of software for design, formatting, web authoring (including mark-up languages), content management and citation management, and the interaction of word-processing software with these programs.

*Includes different document and graphic file formats and their use in the publishing process.*

### A6.4 Accuracy in content transfer.

*Includes identifying typical errors that may arise with scanned material, text derived from voice-recognition software, material transferred from word-processing software to formatting software and material copied from websites into word-processing software.*

### A6.5 Style guides or style manuals appropriate to the genre. IPEd recognises the *Style manual for authors, editors and printers* (most recent edition) as the standard Australian editorial reference.

*Also includes the use of dictionaries, thesauruses and specialist references.*

### A6.6 Standard mark-up symbols and conventions for copyediting and proofreading.

## C. Substance and structure

Editors can be expected to ensure that the form, arrangement, focus and length of a publication are suitable for its purpose, taking into consideration the intended audience, author's intention, available resources, medium of publication and level of editorial intervention required.

### C1 Appraisal

**Editors exercise their judgement in determining whether basic structures are in place, the sequence of ideas is logical and material with potential to be used for multiple formats has been identified. In particular, editors are required to evaluate the following:**

#### C1.1 Suitability and quality of the original material.

*May include printed and onscreen text, media assets such as video and audio files, and interactive activities such as quizzes.*

#### C1.2 Length, structure and focus appropriate for the purpose of the publication, intended audience and medium.

#### C1.3 Textual devices for people to find their way around a publication.

*May include a table of contents, cross-references and index.*

#### C1.4 Content from the publication with potential to be used for other purposes, such as promotion and marketing.

*For example, an editor may be required to draft a blurb or select text for use in promotional material.*

#### C1.5 Additional material to enhance a publication in multiple formats.

*For example, the e-book version of a publication may benefit from additional content such as author interview, animated diagrams, interactive quizzes, video tutorials or games.*

**B2.4** Formal agreements that detail, at least:

- responsibility, accountability and authority of each party
- services and final output required
- schedule for receipt of material and handover of completed work
- methods of communication
- process for agreeing on variations
- remuneration.

## **B3 Monitoring**

**Organisation and communication in the publishing process are essential. Editors must track and record the following:**

- B3.1** The project's progress against budget, schedule, scope of work and required quality.
- B3.2** Communication with client and team members to ensure that the team meets deadlines, contains costs and prevents problems.
- B3.3** Version control of successive drafts and proofs, including sources of change.
- B3.4** Formal project closure and evaluation of the extent to which the project achieved its objectives.

## **A7 Printing and replication processes**

**Different publishing processes bring different kinds of problems. The more editors know about the following processes, the better they will be able to make informed choices at all stages of a project:**

- A7.1** Technical requirements associated with different production methods.  
*Includes colour systems, paper sizes, screen resolutions and file sizes.*
- A7.2** Prepress, print production and proof-checking processes.
- A7.3** Characteristics of different types of printing, embellishment, paper and binding styles.
- A7.4** Production requirements for dissemination of onscreen publications.
- A7.5** Accessibility of printed and onscreen material for all users, including people with disability.
- A7.6** Procedures for website and document maintenance.  
*Includes backing up, archiving, handling responses, updating and authorisation procedures.*

## B. Management and liaison

Editors can be expected to undertake a range of tasks, from managing the entire publishing process to performing one very specific part of it. Regardless of the size of a publication or the extent of their role, all editors need to manage their own time and resources. They also need good communication skills, initiative, tact, perseverance, flexibility and respect for others' points of view. This section describes what editors must know and be able to do to define, document and monitor a project.

### B1 Project definition

**To maintain a schedule, and to negotiate and keep track of changes, project managers must establish the following aspects of a project:**

**B1.1** Project purpose, audience and delivery mode.

**B1.2** Definition of client and lines of authority.

**B1.3** Components of the publication.

**B1.4** Specification of quality required, and the resources needed to achieve such quality.

*Includes the range of publishing skills and services, time, budget, materials, equipment and facilities.*

**B1.5** Publishing team members, and definition of their responsibility, accountability and authority.

*May include people responsible for project management, editing, design, illustration, photography, electronic publishing, web design, web maintenance, typesetting or compositing, proofreading, indexing, prepress, printing, publicity and marketing.*

**B1.6** Final output required from available resources.

**B1.7** Review and approval processes.

### B2 Project documentation

**Tasks required to complete project documentation include preparation of the following:**

**B2.1** Project plan, identifying:

- work required and those who are to accomplish the various tasks
- guidelines for writing, editing and design
- equipment and facilities required
- detailed, realistic timetable
- budget and payment schedule
- approval processes
- document-management system.

*A document-management system controls drafts, file naming, tracking and marking up changes, backing up files, and archiving text and original illustrations.*

**B2.2** Designer brief.

*Includes sample setting, sample content, text elements and estimated length of a publication.*

**B2.3** Content outline.

*Includes a table of contents or a high-level summary (printed material); flow charts, storyboards or site maps (onscreen material).*