
Proofreading Today

A training course by distance learning

Graham Smith

EDITORIAL
TRAINING

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The Author

Graham Smith is a publisher, editor and trainer with over 20 years' experience of books, Internet, CD-ROM and corporate publishing.

After training as an engineer he moved into publishing, initially as an editor for a communications agency producing corporate literature for aerospace and engineering companies. He then moved over to consumer publishing, editing illustrated non-fiction books for international markets. He eventually ended up managing the complete publishing programme for Salamander Books, a major UK publisher of general interest illustrated non-fiction.

Since then he has been Managing Editor on a series of historical educational CD-ROMs for First Information Group, and was Content Manager and Publisher for BT's Campus series of educational websites for schools and parents.

As well as his in-house background, Graham has extensive freelance experience. He has worked for a range of clients on illustrated books, business titles, fiction, children's books, academic books and commercial websites. He has also written six books himself on history, military and general interest subjects.

A qualified trainer, he has spent five years managing the training business for a major publishing training organisation. He now runs his own company, providing short, effective courses in essential publishing and writing skills to publishers, government organisations, charities, corporates and others. He is also an accredited trainer to the European Commission and European Parliament.

But Graham also remains a working editor and proofreader and regularly takes on freelance assignments for UK and overseas publishers.

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Module: Introduction

Module objectives

After working through this introduction module, you will have an understanding of:

- how this course is structured
- the tools, equipment and books you will need
- the best environment for proofreading
- the publication production process
- the role of the proofreader

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Unit Intro 1: Introduction to the course

Objectives

After reading this unit, you will have an understanding of:

- how this course is structured
- how you should approach the course

What you need

Being a proofreader is not easy. The work demands high levels of concentration, an untiring eye for detail and a firm grasp of language, grammar, spelling and punctuation. On top of these general attributes you also need professional skills and knowledge - which this course will teach you.

By working through the modules, units, exercises and assignments in this course, you will learn how to deal with different kinds of publication, what to look for when proofreading and how to mark corrections with the standard proofreading symbols. You'll also gain an understanding of how the proofreader fits in to the publishing process and how to develop a professional approach to finding work and dealing with clients.

While this is a proofreading course and not a grammar course, we do cover some punctuation issues. What's more, everyone who enrols on *Proofreading Today* also has access to extra online resources, which include guidance on key grammatical points.

Course structure

After this introduction, the course is divided into five modules, which are themselves subdivided into a sequence of units. Each unit covers a specific topic and has explanatory text, examples and, usually, a short exercise to give you practical experience. The self-test exercises are not marked by us and are solely to give you practice and to help reinforce your understanding of a module before you try the assignment.

Modules 1, 2, 3 and 5 finish with an assignment. You need to complete these in turn and send them back to us for marking. You will be allocated a tutor who will mark all your assignments and provide feedback and guidance when your marks are returned to you. You will also have the opportunity to email your tutor if there are particular issues with an assignment on which you would like further clarification. Module 4 finishes with an online test, which is marked automatically.

The marks from the four assignments and the online test will form the basis of your final grade. Not all assignments carry the same amount of marks; the first assignment accounts for less than the others and the final assignment accounts for more.

How to use the course

You should work through the modules and units in sequence, making sure you fully understand the content of each, and have done the relevant self-test exercises before moving on to the next. Each of the units and exercises is designed to reinforce and build on what went before. Therefore, you should resist the temptation to leap forward and skip sections.

Once you send an assignment to us for marking, you can carry on working through the next module once we send it or release the download to you. But we strongly recommend that you do not attempt a subsequent assignment until you have read and fully digested the feedback from your tutor. You get only one attempt at any assignment and you should therefore make sure that you have a solid grasp of the relevant material before attempting to complete it.

The online student area

When you enrol, you will receive a username and password, which will enable you to log in to the Editorial Training student area. This is designed to help you keep track of your assignments. In it, you will be able to view your assignment scores so far and confirm whether we have received any assignments you have sent recently.

You will also need to access the student area to complete the online test that accompanies Module 4. You do not have to complete the test in one sitting, and can save and come back to your answers as many times as you wish before submitting them. Once you have submitted your final answers, they will be marked automatically and the result will be available immediately.

Unit Intro 2: Your working environment

Objectives

After reading this unit, you will have a clear idea of:

- the tools, equipment and books you will need
- the best environment for proofreading

Room space

Proofreading as a career involves sitting down and concentrating for long periods of time, as does working through the units, exercises and assignments in this course.

To be effective you need to create a working environment that's as comfortable and as efficient as possible. A proper desk with an office chair is best, as is good, clear lighting. The desk should have enough space to hold at least four piles of paper (up to A3) side by side, plus the books, pens and notepads that you will use.

Make sure your chair is of good quality and is set to the correct height and back angle for you. There are plenty of books, leaflets and web resources that explain the health risks of an incorrectly set workspace, and show you how to make sure your chair, desk and environment are right for you. See *Appendix A: Reference and information* if you would like to know more.

You can get by in less effective surroundings for now, even using the kitchen or dining room table, but the closer you get to ideal office conditions the better, both for your health and your concentration.

Peace and quiet

You'll also need a quiet environment where you can work undisturbed. You are not going to learn effectively by leafing through the course while sitting on the sofa with the TV on and the family talking in the background.

If you are taking the course while at work, perhaps you can get someone else to take your phone calls for a while. If the office is noisy, either try to close the door or find somewhere else. If that's impossible you could at a pinch put a pair of light headphones on. You don't need any sound coming through them but they do help cut out some background noise.

Try to set aside solid blocks of time. If you try to fit the coursework into a few minutes here and there, possibly while you are also thinking about other things or are open to interruption, you will find it much harder to make progress.

Take breaks

It's wise not to try to take in too much new information in a single long session. Set yourself a limit, perhaps 45 minutes to an hour for any one session. Some of the assignments will take longer and here you need to pace yourself. Experienced proofreaders know that their concentration drops after a while, and that they need to take regular short breaks. Make sure you do this every 45 minutes or so: get up, walk around, stretch, rest your eyes, have a drink. If you don't your concentration will flag and you will miss errors you should have spotted.

Reference books

At the minimum you should have access to a good dictionary. A shorter spelling and word-break dictionary is also useful, as is a style guide and an editing reference. A PC with an internet connection can also help with fact-checking.

See *Appendix A: Reference and information* for more details and recommendations.

Stationery

If you are working on paper proofs you need a selection of normal office stationery, which should include:

- black, blue and red pens
- pencils
- eraser
- correction fluid or tape
- ruler
- stapler
- self-adhesive notes
- paper clips and some bulldog clips
- long elastic bands (for holding bundles of paper proofs)

If you are working on-screen you still need paper and pen to make notes as you work.

IT, email and the internet

You need a computer, internet access and email to have a career as a proofreader. Of course, it is still possible to work solely on paper proofs, sent to you and returned by post. But if you try to establish yourself as a freelance without the client being able to email you or send you electronic files, you will lose work to your competitors who have made themselves more easily available.

That's the situation now - what of the future? The publishing world is constantly changing, and more and more of the workflow is expected to become electronic and on-screen. If you want to stay in it, you'll need to be able to adapt as systems, processes and technology change.

Unit Intro 3: Where the proofreader fits in

Objectives

After reading this unit, you will have an understanding of:

- the publication production process
- the different roles within the publications team
- the role of the proofreader

The first thing to clarify is what we mean by proofreading.

- Proofreading is checking that a document as laid out for print is what has been asked for by the author and editor.
- The proofreader is responsible for the final checks before a publication is printed or published online.
- Proofreading is not editing.
- Proofreading is not rewriting.

Proofreading requires judgement. You need the judgement to know when to correct something and, just as importantly, the judgement to know when not to change something. It's this judgement that is probably the most difficult attribute to gain, and it's the effective application of it that will set you above the rest.

A precursor to gaining that judgement is an understanding of how the production process works, and how different companies carry out the tasks of getting words from the mind of the author into printed form.

The production process

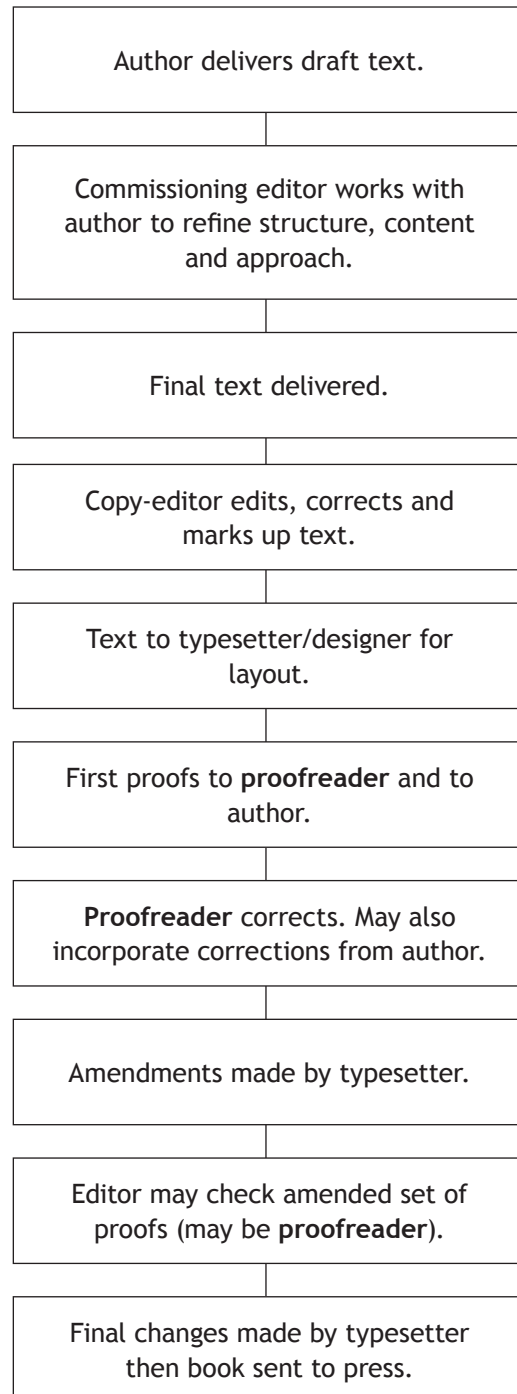
For any publishing production process to work smoothly and effectively, the following points are essential:

- There must be a definite progression within the workflow.
- Everyone in the process must work as a team.
- Everyone must have clearly defined roles.

A typical book (especially a text-only volume) might follow the workflow as shown in the diagram on page 7.

One example of the production process

This is a typical production workflow for a text-only book. It's only one example. Different companies may do things in different ways, and the detailed workflow for other items such as leaflets, brochures, journals or illustrated books will also be slightly different.



What an editor does

‘Editor’ is a remarkably flexible word, and is used to describe roles ranging from setting the content and approach of a magazine, chairing the review committee of a learned journal, finding and commissioning authors for a publisher, through to detailed correction and marking up of an author’s text for typesetting and layout.

Job titles vary from company to company, but in most book publishers there will be a *commissioning editor* with responsibility for the profitability and development of the list of books under their management. They will find and contract the authors and then work with them on the scope, content and approach of their books, but usually hand the text over to a desk editor once it has been delivered. The commissioning editor is usually a full-time employee and often has a managerial role within the company.

A *desk editor* (who may also be known as editor or production editor) is usually responsible for managing the book through the editing, design and proofing process. The desk editor can either be staff or freelance, and may either copy-edit text themselves or manage the efforts of freelance copy-editors.

The *copy-editor* can be an employee or a freelance. The copy-editor will take the author’s text and prepare it for typesetting and layout. They will correct spelling and punctuation errors, fix grammatical problems, query possible factual inaccuracies and perhaps apply standardised terminology and the company’s house style (more on this in later units) to the text. The editor will also mark up the text for layout by identifying heading levels, special typographic treatment and different text elements. They may work on-screen or they may mark up a printout of the author’s text.

Typesetting, design and layout

Before desktop computer systems became widespread, designers and typesetters had separate and well-defined roles. The author’s text would arrive as sheets of typed manuscript and be marked up by the copy-editor. The *designer* would decide how the publication should look and create a specification covering the fonts, line width, heading styles and other parameters. The *typesetter* would retype the text (incorporating the editor’s marked changes) into their typesetting machine, using special codes to follow the specification created by the designer.

With the advent of desktop page layout systems, the designer and typesetter roles have merged to a large extent. If the author delivers a manuscript electronically (by disc or by email), the copy-editor may still mark their corrections on a paper printout, or they might correct the electronic file, allowing the designer or typesetter to import the text directly into their page layout program.

In some publishing workflows a typesetter will incorporate this text into a design template created by the designer. In others, the typesetting will actually be done by the designer, who will lay the pages out, deciding on the position, size and style of the pictorial and text elements on each page.

For clarity, in this course we'll use the term *typesetter* for the person who creates the proofs in whatever computer package is used, and who actually has to key in the corrections identified by the proofreader.

Highly illustrated books follow a slightly more elaborate path, in that illustrations are created and photographs procured in parallel to the copy-editing and typesetting.

For some publications, especially journals and papers for an academic audience, a more technologically complex process is followed, where text is 'coded' in a computer mark-up language (usually XML). One reason why is that when the material is run out to page proof, the computer will style and place the text to a pre-defined template using these tags as instructions. In theory this allows the same text to be used for different applications, whether paper or electronic, and allows elements to be automatically extracted for summaries, abstracts, indexes etc. Much of this coding work is currently done in India.

But every company is different. They don't all move with the technological times at the same speed, while each one has its own work processes, terminology and job titles. If you are setting out to be a freelance proofreader, you need to remain flexible enough to deal with them all.

What a proofreader does

As a *proofreader*, you will work closely with the output from the copy-editor and with the page layouts created by the typesetter. Your job will be to check that what the author, copy-editor (and designer) have asked for is reflected in the proofs.

If you are working on a book project, you will most likely be given a set of proofs from the page layout program, printed from an office laser printer. It's also likely that you will have a paper copy of the author's typescript, complete with the copy-editor's marks. Your job will be to check one against the other, line by line, making sure the layout and typesetting have been done correctly.

Your proofs will go back to the typesetter to have your corrections incorporated. A second set of proofs may be produced to check that these have been done, and that no new problems have been caused as a result. These are normally checked by the in-house editor but occasionally do get sent to a freelance. If the corrections were extensive, or the publication demands absolute accuracy, the typesetter may even run out third and subsequent proofs.

However, this is not the only way of working. You may get your proofs sent to you as an electronic file, perhaps as an Adobe PDF file, sent either by email or on a physical medium such as a CD. Here you'll either read the files on your own computer screen or print them out yourself and check the paper printout. The implications of such an electronic workflow will be examined in Module 4.

It's also possible that you'll need to proofread with no edited copy available. This *blind proofreading* is more common in a business environment and demands its own approach. There will be blind proofreading exercises throughout this course.

What a proofreader doesn't do

You are not the editor. That job should have been done already before the proofs got to you. You may pick up editorial points that the copy-editor has missed, but how you react to these will depend on the publisher's particular requirements, budget and schedule. You may even disagree with the editorial decisions taken by the author or editor, but that's too bad. The publisher paid them to do that job, not you.

One of the most common mistakes made by the new proofreader is to overcorrect, change the editor's decisions and argue at length over minor editorial and grammatical points. It's also a quick way for a freelance to ensure that they only ever do one job for a particular client. So if you feel you have a personal mission to defend the English language and to make a stand against the decline of the national education system, you need to take that battle elsewhere. The publisher wants a quick, reliable job by someone who spots the errors but who exercises sound commercial judgement in deciding what to correct, what to query, and what to leave alone. It isn't easy - which is why this course exists.

Changing workflows

The continuing trend is for publishers to cut down the number of stages and people involved. The merging of the typesetter and design roles is an example of this. Many jobs will not go through a second proof stage, while some publications (especially academic papers) don't use a separate proofreader at all and rely instead on the author to check their proofs.

In a business or marketing environment, it is often the case that stages are compressed further. It may be that the authors lay out the text as they write, which requires editing and proofreading to take place simultaneously after the document has been laid out. Not necessarily best practice but certainly real life.

Some documents will demand various sign-off stages, perhaps from external agencies. Business proposals may need approval from a board, and educational or examination material may need sign-off from a relevant awarding body. Such sign-offs are significant for the proofreader in that they create the probability of changes and corrections (and new errors) late in the process.

As a proofreader, you need to be able to cope with different ways of working and with different document production workflows. If you work as a freelance you will need to adapt to each of your customers and quickly understand their standards and ways of working.

You are now ready to continue to **Module 1: The basics of proofreading**.

Good luck!

Enrolment form for *Proofreading Today*

Please complete this form in **BLOCK CAPITALS** and return it to us by post or fax to the address or number shown at the bottom of the page.

Title: Mr Mrs Miss Dr Other (please specify): _____

First name: _____ Surname: _____

Job title: _____

Address for correspondence and course materials: _____

Postcode: _____

Telephone/Mobile: _____ Email: _____

PAYMENT

Would you like to sign up only for Module 1 now, or for the entire course (**please tick one box**)?

Please enrol me on the *pay as you learn* scheme for *Proofreading Today* at £95 for Module 1.

Thereafter, I will contact you should I wish to enrol on subsequent modules, which cost £50 each (prices include VAT, postage & packing).

Please enrol me on Modules 1–5 of *Proofreading Today* now (£295 inc. VAT, postage & packing).

Method of payment (**please tick one box**):

Cheque enclosed for £95 | £295 (delete as appropriate) made payable to Editorial Training.

Please debit my credit/debit card for the sum of £95 | £295 (delete as appropriate).

Please debit my: VISA / MASTERCARD / MAESTRO / CONNECT

Card no: _____

Valid from: _____ Expiry date: _____

Issue no (Maestro): _____ 3 digit security no (last 3 digits on reverse of card): _____

Cardholder's name: _____

Cardholder's signature: _____ Date: _____

I wish to be invoiced

Is a Purchase Order number required on the invoice? Yes No

PO Number: _____

Invoice address (if different from above): _____

TERMS & CONDITIONS

1. If you decide that the course is not for you, there is a cast-iron 30 day money back guarantee.
2. Enrolment is for a period of 12 months, which can be extended at the discretion of Editorial Training.
3. Your fees include all the course materials and tutor support.

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