

Establishing an Editorial Process: Tools for Success

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INTRODUCTION

- Whether you are one in a group of editors or working independently, every editor should understand their responsibilities and goals and follow a consistent approach to meeting those goals. Specifically, editing is optimized by using a standard editorial process.

STANDARD EDITORIAL PROCESS

Goals of a Standard Process

- A standard editorial process is essential in helping to do the following:
 - Maximize efficiency and accuracy:** Following a standard process results in a faster and more precise edit.
 - Improve editorial teamwork and flexibility:** A standard process allows editors to share work seamlessly because all are following the same approach to editing and associated responsibilities.
 - Assess your organization's editorial needs and manage workload:** Developing consistent estimates for required editing time and a standard process for scheduling editorial requests allows you to accurately assess your organization's editing needs and plan to accommodate them.
 - Clarify expectations:** Sharing your editorial process with all of your colleagues, regardless of their role, ensures that expectations of an edit are consistent and the roles and responsibilities are clear.
 - Establish credibility and expectations for quality:** Developing a consistent, repeatable, and thoughtful approach to editing helps to establish your organization's quality standards, demonstrates your team's professionalism, and highlights your contribution to the organization.

Establishing a Standard Process

- Establishing a standard editorial process can be daunting.
 - Expectations vary for what an editor does and how an edit is performed, even among editors.
 - Company management often has very high expectations for quality but likely has little involvement in providing and enforcing standards to meet those expectations.
 - Timelines are ambitious and require a consistent and efficient approach to editing.
 - Even if you understand your approach and goals, you still must implement and follow your process.
- Some of the most important attributes associated with establishing and maintaining a standard process are the following:
 - Leadership:** Management is unlikely to establish standards on behalf of editing and is unlikely to understand what editorial standards would comprise. Do not be afraid to guide the organization using your knowledge and experience and to "own" this process.
 - Visibility through communication:** As your process develops, share accomplishments and updates with your organization. Use consistent terminology and repeated mention of elements of the process (e.g., "Our company's Style Guide," "Our company's Standard Report Template") at any opportunity to reinforce.
 - Training capability:** Offer small-group training sessions on specific aspects of your process (e.g., how to plan for and schedule an edit) and be willing and available to answer one-on-one questions as they arise. Develop and provide a standard orientation for all new employees.
 - Vigilance:** Be persistent—and consistent—in enforcing your process and explaining its value.
- However, these key characteristics are not sufficient to successfully establish your process; they must be supported and driven by editorial tools.
- We recommend the following tools for an editorial process: a style guide, templates, a capacity planning form (request form), available technology, and checklists.

EDITORIAL TOOLS FOR SUCCESS

Style Guide

How to Select or Develop a Style Guide

- Options for establishing a style guide include the following:
 - Developing your own house style
 - Selecting from the multiple recognized style guides available
 - Modifying an existing guide to meet your organization's needs
- Consider the following factors when selecting the most appropriate style guide for your organization:
 - Type of content (e.g., medical, journalistic)
 - Your audience (e.g., European)
 - Writing group background and familiarity (e.g., clinical, academic)
 - Editor familiarity
 - Time available to develop

Benefits of a Style Guide

- Increases efficiency by establishing a single resource for all style matters, ensuring that answers to common questions are quick and easy to find, thereby saving time for writers, reviewers, and editors.
- Promotes consistent content within and among documents, which improves accuracy and clarity.
- Decreases costs by streamlining the process for writing, reviewing, and editing, thus decreasing the resources spent developing company proposals and deliverables.
- Provides support for editorial decisions should writers have other preferences or questions.

Templates

How to Develop Templates

- Consider the following factors when developing company templates:
 - Company branding potential (e.g., colors, logos, font)
 - Appropriateness of traditional layouts and components (e.g., List of Tables; Heading hierarchy presentation; front, body, and back matter distinctions)
 - Style guide—informed table presentation
- Assess company needs to determine how many distinct templates to create.
 - Regulatory or organizational requirements (e.g., AMCP dossiers, post-authorization safety studies, memos, reports, proposals, manuscripts, patient-reported outcome dossiers)
- Determine the amount and type of content to include in the template.
 - Standard text that is always applicable (e.g., confidentiality statement)
 - Standard placeholders (e.g., title, subtitle, date, paragraph/text)
- Use built-in Word styles, create new styles, or modify built-in Word styles for desired presentation.
- Consider where to house the latest version of your templates, ensuring that they are accessible to all writers but have restrictions on modification (e.g., using .dot files, limiting access using folder properties).

Benefits of Templates

- Provide consistency, uniformity, polish, and company-specific distinction.
- Reduce review time.
- Focus editor on content versus layout.
- Enable dissemination of new regulatory content requirements (e.g., AMCP updates) or other updates by changing one master document for everyone's use instead of making changes to multiple documents at time of edit.

Request Form

How to Develop a Request Form

- Determine the various types of editing tasks in your organization (e.g., formatting only, edit of tracked changes, final edit with abbreviation and reference checks, manuscript edit according to a journal's requirements).

- Quantify the time needed for each type of editing task based on unit count (e.g., page, slide).
 - Base estimates on published literature regarding editing speed and your experience with the organization's documents
 - Create task-specific calculations (see Table 1) that provide an accurate estimate of total editor time needed
- Provide an easy-to-use interface for the writer to communicate editing needs and to select services (Figure 1).

Table 1. Edit Time Estimates

Edit Description	Pages per Hour
Reports, Dossier, Memo, SAP, Protocol, White Paper, and Similar	
Edit and format (total no. of pages)	5
Appendices (if sent separately from the main document)	
Edit (total no. of pages requiring edit)	5
Format (total no. of pages for ALL appendices)	20
Manuscript	
Edit (total no. of pages)	5
Format for journal (total no. of pages)*	10
Slide Set	
Edit (total no. of slides)	10
Format (total no. of slides)	12
Questionnaire/Survey	
Edit and format (total no. of pages)	10
Interim or Final Draft	
Edit and format (no. of pages with tracked changes)	4
Abbreviation check (total no. of pages)	40
Reference check (total no. of pages)	40

SAP = statistical analysis plan.

Figure 1. Example Request Form for Standard Report

Requester inserts total number of pages (including front matter)

In this example, appendices include 15 pages of results tables (edit and format) and a 15-page final protocol (format only)

Options distinguish what we do and communicate that all editorial tasks do not have the same time requirements

Based on task(s) type selected and total page count, a total time needed is generated for the requester and editor

Benefits of a Request Form

- Quantifies and communicates editing times for work capacity planning.
- Functions as a project management tool for timeline planning and project budgeting, ensuring adequate time for editing and formatting.
- Allows editors to schedule appropriately.

Technology

How to Leverage Technology When Editing

Macros

- Microsoft Word Help can guide novice users to create simple macros for repeated tasks.
- For more in-depth instruction and applications, purchase books and bundled macros targeting editorial needs (e.g., EditTools, Editor's Toolkit).

Wildcards

- Wildcards are similar to Microsoft Word's find-and-replace function but can complete more complex tasks (e.g., adding a comma to 5-digit numbers).
- Microsoft Word Help provides basic information for using wildcards, and multiple sources provide useful instruction.^{1,3}

Proofreading Software

- Microsoft Word can note potential spelling and grammar problems.
- However, proofreading software can go above and beyond these types of checks, providing assessment of consistency, style compliance, and common errors (e.g., issues with acronyms, capitalization, and punctuation). Some even generate lists of acronyms.

Benefits of Technology

- Increases efficiency by leveraging technology to complete routine tasks.
- Maximizes the time available for content review.

Checklists

How to Develop Checklists for Your Organization

- Define what a full editorial review comprises in your organization (e.g., proofing text, checking style adherence, formatting to template, and checking abbreviation list)
 - Establish a detailed list of editorial tasks that fulfil your criteria for editorial review and organize in order of importance, focusing on issues that have the greatest impact on the document.
 - Using your definition of full editorial review, consider the extent of the review needed by type of document (e.g., manuscript submission vs. slide set), document stage (e.g., draft vs. final), and time and budget available (e.g., abbreviated vs. full) to determine if the variety of work you or your group typically performs requires more than one checklist.
 - Avoid jargon and clearly explain steps so that editors and noneditors alike understand what has been performed.
 - Promote awareness of checklist(s) and your team's use of checklists (e.g., present to new staff during orientation, include with return of completed edit).
- #### Benefits of Checklists
- Standardize an editorial team's approach to an edit.
 - Improve the thoroughness of an editor's review.
 - Clarify writer and editor expectations.
 - Provide a clear summary of what was and was not accomplished in the event of restricted timelines.

Table 2. Sample Editing Checklist

Format	
✓	Ensure consistent file formatting and correct page breaks
Autochecks	
✓	Run macros, spelling and grammar check, proofreading software
Document QC	
✓	Verify title and date on cover page and headers
✓	Verify contact information is complete
✓	Check section headings, figures, and tables for consecutive numbering
✓	Verify correct use of acronyms and abbreviations
✓	Verify acronyms and abbreviations are included in abbreviation list appropriately
✓	Ensure that references cited in text are present in reference list and vice versa
Basic Edit	
✓	Check spelling, grammar, and punctuation
✓	Ensure consistency in capitalization, hyphenation, and number style
✓	Ensure accuracy of cross-references
✓	Verify that all necessary information is included per the template
Substantive Edit	
✓	Ensure the order of presentation is logical and fits into a coherent whole
✓	Revise content, organization, or tone as needed
✓	Suggest transitions and text modifications to smooth shifts between authors
✓	Change sentence structure from passive to active voice if appropriate
Finalization of Format and Edit	
✓	Update table of contents
✓	Perform spellcheck
✓	Check page numbering
✓	Create PDF

CONCLUSIONS

- Developing a standard editorial process for your organization requires a variety of tools to support professionalism, efficiency, and review quality.

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