Editorial ROADMAP

The Path to a Complete, High-Quality Edit

We've all been there as an editor: a client gives you a document for editing, and the document is all over the place. There are five different fonts for body text. Words are misspelled. Hyphenation use is inconsistent. Heading numbering is not sequential. Figures appear cut off. Half of the document uses author-date citations for references, and half uses numbered references. On top of that, the document is twice as long as you thought it would be. All of this means that you, as an editor, have a big journey ahead to make it to your final destination: a happy client. Here, we present the steps along the way that you must take to provide your client with a complete, high-quality edit.

MILE 1 — Format the document according to journal/organizational style or a specific style guide
- It is most efficient to use an already-established template.
- Apply appropriate Microsoft Word styles to the text, tables, and figures.
- Check page headers, footers, page numbers, and section breaks.
- Insert cross-references to tables, figures, sections, and appendices.

MILE 2 — Develop a project style sheet
- Include client-specific style requests that depart from your organization's style and other project-specific terminology not covered in your organization's style guide.
- Include an editorial log indicating what has been accomplished in each draft.

MILE 3 — Run spell check
- Use a medical spell check software, if available.

MILE 4 — Run macros that clean up common errors found in documents
- Use a set of macros to reduce the time it takes to perform repetitive tasks when editing.
- *Scan the QR code to find out more and see macros in action >>*

MILE 5 — Use a consistency-checking software
- Use consistency-checking software to reduce the time it takes to perform find/replace searches for terminology and to streamline basic formatting tasks.
- *Scan the QR code to find out more and see consistency-checking software in action >>*

MILE 6 — Perform a full edit
- Pay attention to style, flow, and grammar.
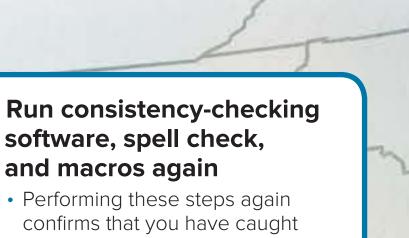- While editing, write down any inconsistencies or issues that would not be caught by a macro or editing software. Perform a series of find/replace searches to resolve.
- Perform an abbreviation check of each table/figure and include an abbreviation list for each.
- Review the project style sheet and ensure terminology is consistent throughout.

MILE 7 — Perform an abbreviation check of the entire document
- Perform an abbreviation check with the help of a macro.
- *Scan the QR code to see an abbreviation check macro in action >>*
- Start with your cursor at the beginning of the document and search for the abbreviation.
  – Make sure the expansion appears next to the first use of the abbreviation.
- With your cursor at the beginning of the document, search for the corresponding expansion.
  – Make sure the expansion does not appear after the introduction of the abbreviation in running text; replace any such uses with the abbreviation.

MILE 8 — Perform a reference check
- If the document uses reference management software, update citations and bibliography.
  – *Scan the QR code to watch reference management software update citations and add a bibliography to a document >>*
- If the document does not use reference management software:
  – Edit in-text citations for a consistent presentation.
  – Run macros to identify all cited references and compare the macro-generated reference list with the document's reference list.
    – *Scan the QR code to watch a macro generate a list of cited references >>*
  – If a reference is incomplete, add a comment requesting the missing information.

MILE 9 — Run consistency-checking software, spell check, and macros again
- Performing these steps again confirms that you have caught any errors or inconsistencies introduced during editing.

MILE 10 — Update hyperlinks
- Select the entire document; press F9 to update the table of contents, table and figure lists, and all cross-references within the document.

Final destination: Happy client!
- Following a set editing process ensures high-quality, consistent documents that exceed expectations.

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