

CyberText Consulting: Editing Levels Triage List

This 'triage list' of editing levels summarises the **typical copyediting tasks** covered in a *Basic* or *Full* edit of a Microsoft Word document; the *Extras* level includes tasks that normally aren't part of my copyediting services. Some tasks may be done concurrently; some may be dropped depending on your requirements and the type of document. *If your priorities differ from the standard tasks for each level, indicate this in the last column, then scan the completed document and email it to info@cybertext.com.au.*

How long your job will take? Well, it all depends... but as a guideline, use these time estimates:

- **Large document** (~80–200 pages, with tables, figures, appendices, etc.): Basic 10–40 hours; Full 40–60 hours; Extras 50–80 hours (very large documents [over 200 pages] *will* take longer)
- **Medium document** (~20–80 pages, a few tables/figures): Basic 4–15 hours; Full 15–40 hours; Extras 20–50 hours
- **Small document** (<20 pages, no tables/figures): Basic 1–5 hours; Full 5–10 hours; Extras 7–15 hours.

GENERAL NOTES:

- All estimates are subject to change once I see the amount work a document needs and the writing style.
- A check mark in this triage list typically means 'check, then fix if there are errors'.
- Although I aim for the holy grail of a 100% error-free document, I'm only human and cannot and will not guarantee zero errors.

Editing Task (as applicable)	Editing Levels			My priorities
	Basic	Full	Extras	
Create a copy of the original document and work on the copy	✓	✓	✓	
Track changes to text, and any other changes that may change meaning (do NOT track minor/mechanical changes or formatting [see Notes at the end of this document])	✓	✓	✓	
Follow the style guide/sheet, if there is one	x	✓	✓	
Templates, styles, formatting				
Verify correct template; if necessary, copy content to new doc based on the template	✓	✓	✓	
Set up a template (with styles) from scratch	x	x	✓	
Accept all formatting tracked changes; turn off track formatting	✓	✓	✓	
Apply template's styles (format text, tables, headers/footers, headings, captions etc.); if no template, check styles for consistency	✓	✓	✓	
Check heading and caption case and punctuation	x	✓	✓	
Check bulleted and numbered lists are correctly formatted with styles	✓	✓	✓	
Check bulleted and numbered lists are correctly styled and use the relevant levels	x	✓	✓	
Check styles used for appendices and elements within appendices (e.g. headings, subheadings, captions)	✓	✓	✓	
Check headers/footers	✓	✓	✓	

Editing Task (as applicable)	Editing Levels			My priorities
	Basic	Full	Extras	
Check page orientation, margins, and paper size; adjust headers/footers and page numbering accordingly	✓	✓	✓	
Check for blank pages, incorrectly placed graphics, incorrect headers/footers for the page orientation, etc.	✓	✓	✓	
Check page and section breaks are logical and don't split content awkwardly; avoid manual breaks where possible	✓	✓	✓	
Remove all extraneous marks (excess spaces, tabs, line and page breaks, etc.)	✓	✓	✓	
Insert nonbreaking spaces between values and their units of measure	✓	✓	✓	
Front matter				
Check title page and front matter (e.g. document control information)	✓	✓	✓	
Create/verify table of contents	✓	✓	✓	
Check lists of tables, figures, and appendices are included in the front matter; update	✓	✓	✓	
Tables and figures				
Check all tables and figures have auto captions	✓	✓	✓	
Check table and figure caption location, formatting, separators, alignment, and case	✓	✓	✓	
Format tables; check table header row repeat is on	✓	✓	✓	
Check figures for correct spelling of labels/legends, correct measurement units, clarity of images, lines, and text, etc.	✗	✓	✓	
Check alignment and size of figures	✗	✓	✓	
Check placement of notes and source information for figures and tables	✓	✓	✓	
Abbreviations and terms				
Identify all acronyms, abbreviations, initialisms, and unfamiliar words, and include each in the terms list if used more than once in the document	✗	✓	✓	
Delete any unused terms	✗	✓	✓	
Sort terms into alphabetical order	✓	✓	✓	
Citations and references				
Check citation formatting; if numbered cross-referenced citations are used, check the links	✗	✓	✓	
Check citations match the corresponding items in the references list; delete uncited references (track changes on)	✗	✓	✓	

Editing Task (as applicable)	Editing Levels			My priorities
	Basic	Full	Extras	
Check formatting of bibliographic items in the references list; make sure there is sufficient publication information for others to find the resource	x	✓	✓	
Check URLs and DOIs (NOTE: This can add many hours)	x	x	✓	
Check accuracy of bibliographic data (NOTE: This can add many hours)	x	x	✓	
Check journal abbreviations and titles (NOTE: This can add many hours)	x	x	✓	
Accuracy and consistency checks				
Apply correct spelling language settings to entire document	✓	✓	✓	
Check spelling (general) according to specified dictionary	✓	✓	✓	
Check/confirm spelling, spacing, and capitalisation of company names (in full and abbreviated)	x	✓	✓	
Check/confirm spelling of personal names, job titles, etc. (if possible)	x	✓	✓	
Check spelling of geographic names and locations	x	✓	✓	
Check consistency of names, phrases, hyphenation, etc.	x	✓	✓	
Check calculations in tables and equations (where possible)	x	✓	✓	
Check formatting of chemical symbols	x	✓	✓	
Check formatting of Latin names and abbrevs (including species' names)	x	✓	✓	
Check spelling of Latin names and abbrevs (including species' names)	x	x	✓	
Check formatting of species' common names (e.g. initial capitals or not; hyphenation or not)	x	✓	✓	
Check spelling of species' common names	x	x	✓	
Check formatting of long numbers	x	✓	✓	
Check date formatting	x	✓	✓	
Check currency designators are used, and date the amount applied	x	✓	✓	
Alert author to anything potentially requiring a legal opinion (copyright, libel, plagiarism etc.; NOTE: I'm NOT a lawyer, so can only alert the author if something raises a red flag for me)	x	✓	✓	
Check for duplicate words (e.g. the the)	x	✓	✓	
Check case used at beginning of bulleted and numbered lists	x	✓	✓	
Check all cross-references to sections, tables, figures, appendices are automated fields and the links work	✓	✓	✓	
Check page numbering	✓	✓	✓	
Check notes, cautions, warnings for consistency	x	✓	✓	

Editing Task (as applicable)	Editing Levels			My priorities
	Basic	Full	Extras	
Update all fields and check for error messages	✓	✓	✓	
Read every word of the text				
Check for redundancy, repetition, misused words, and general word usage errors	x	✓	✓	
Check subject/verb agreement	x	✓	✓	
Reword/rewrite in plain language for clarity	x	✓	✓	
Split long sentences into two or more	x	✓	✓	
Move/delete words, phrases, sentences, paragraphs to improve clarity	x	✓	✓	
Check grammar and punctuation	x	✓	✓	
Use serial (Oxford) commas in run-on lists to remove ambiguity	x	✓	✓	
Check for parallel verbs in bulleted and numbered lists	x	✓	✓	
Finalise				
Email author, summarising the changes and main issues found that the author needs to address	✓	✓	✓	

Minor/mechanical changes are not tracked (UNLESS specifically requested to do so); these changes include, but are not limited to:

- changing two spaces to one
- changing case to upper/lower depending on the word
- deleting multiple tab marks to create a single tab
- changing automated bullets/numbering to use bullet/number styles
- changing fonts and styles
- setting margins and line spacing
- changing hyphens to en dashes in number ranges
- changing en dashes or hyphens to em dashes
- changing spaces between values and units of measure to nonbreaking spaces
- changing straight quote marks to curly ones
- changing apostrophes used for minutes/seconds to prime symbols
- changing double quote marks to singles (e.g. US to Australian style)
- deleting extra hard returns/lines (e.g. when used to start a new page) and section/page breaks and applying 'page break before' and/or 'keep with next' paragraph attributes
- adding/changing/deleting punctuation marks (only tracked if the change MAY affect meaning)
- adding serial commas in run-on lists.

(from http://cybertext.com.au/editing_levels.html, 25 November 2019)