Microediting – details matter

Quality, authority, and reputation: The value of microediting

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Abstract

Microediting aims to ensure consistency as well as accuracy within a document and across a document series. Also known as technical editing or mechanical editing, it is an important stage in editing, needed to gain and retain a reader's interest and respect: to assure them that you are giving them a high-quality product. Microediting can involve a large number of wide-ranging tasks, from language editing to formatting and checking the accuracy of data or hyperlinks. We suggest a structured and methodical approach that keeps the reader in mind.

Move over microediting with your fine detail – macroediting comes first.

We know this. And as passionate as we are about microediting, we appreciate that text needs to make sense and be relevant to the reader before we concentrate on the detail such as formatting, consistent spelling, and use of hyphens. What's the point of working on the finer points of text that may well be moved, or even removed, before it's finalised?

The editor's first priority is to make the text clear and enticing so that the reader wants to … read on.

But it's not just unclear and over-wordy text that can discourage readers. Lack of attention to detail can drive them to distraction and make them doubt the quality and authority of what they are reading. Missing out the microediting stage is dangerous: the message of the text may be lost as readers move on quickly to a more authoritative source; bear in mind that a *reader* such as a journal editor or regulator may be making decisions that are crucial for you or your company.

What is microediting?

Microediting is also known as technical editing or sometimes as mechanical editing. For the purposes of this article, we'll use the term microediting, which we consider to be where

you're getting down to the detail, such as looking at the presentation of numbers – a vast and controversial field that could occupy pages and pages of this issue of *Medical Writing*.

The purpose of microediting is to ensure consistency as well as accuracy within a document and across a series of documents. (We use the term document here, but the principles of microediting will also apply to text in digital media such as websites.) When microediting, the editor will be looking out for things such as:

- Adherence to format requirements, as in a journal article
- Formatting, such as heading levels, tables and figures, and page layout
- Use of bold, underline, and italics
- Language, including grammar, spelling, and punctuation
- Hyphenation
- Capitalisation
- Bulleted lists
- Brackets
- Abbreviations
- Reference style
- Units
- … and, of course, numbers!

For digital products, the editor may need to check that all hyperlinks are in the correct style (and that they work!) or the coding that dictates how content is displayed.

Where does microediting fit in the process – when to do it?

As we noted earlier, we think it is more efficient to focus on microediting *after* macroediting. However, that doesn't mean it should be an afterthought. Indeed, we suggest that microediting be considered when planning the editorial process. Asking all contributing authors to adhere to a guide on style essentials should reduce the amount of editorial work needed later. Providing a robust, easy to use template will also help maintain consistency.

Who microedits?

Everyone involved in authoring and editing should be aware of the factors involved in microediting: for example, authors should ensure abbreviations are defined and that they have only one meaning, references are complete, and tables and figures are referenced in the text. However, it's likely to be a medical editor rather than an author who does the full microedit on completed text to spot and correct the inconsistencies, omissions, and errors.

You will probably love microediting if you get enraged by a supermarket sign telling you the check-out lane is for people with *10 items or less*, the greengrocer offering *potato's for sale*, or the missing superscript linking to a footnote in a scientific paper. If you prefer to see the big picture, and enjoy rewriting and restructuring text, macroediting may be your thing. But all medical writers should be aware of the aims and tasks of microediting and its role in document quality.

How to microedit?

Remind yourself about the reader

- Who is the document for?
- What do they want to know?
- What is the message?
- How is the product going to be presented?

The answers to these questions are essential in macroediting, but need to be borne in mind in microediting too. For example, they may influence your decisions on how much to use abbreviations, whether UK or US English is more appropriate, or even what font size would be best.

Know what is required

The tasks covered by microediting to achieve consistency and accuracy are many and varied. What is required will, to some extent, be dictated by the nature and aim of the product being edited. Is consistency across a multi-author work or set of conference proceedings essential? Do you need to check against sources, or has that already been done in the macroediting or in another quality control procedure? Are there tasks you need to do that are specific to the medium of the product, such as checking hyperlinks or the animations in a slide set?

It helps to have a standard operating procedure or list of what tasks need to be done.

Work in style

Use a style guide. That way, you only have to decide once on a particular style issue, making the editing process more efficient.

Most companies have a style guide, but – as you'll be well aware if you work for a contract research organisation or are freelance – they are not all the same. Many aspects of style are subjective. Organisations and individuals have their own preferences, and opinions on whether to use words or numerals for numbers up to nine (or 10 or 12) can be very strongly held. You may disagree with the style guide. Our advice is to live with it unless it introduces an inaccuracy or will offend or confuse the target audience.

If there is no style guide, note decisions you make as you edit so that you can be consistent.

Be methodical

There are several things that can help you take a structured and methodical approach to microediting and enable the job to be done efficiently (see Figure 1).

Rather than trying to check everything as you work through a document, batch up tasks and work in a systematic way: do sequential checks, one task at a time. For example:

- Check the whole document for heading levels.
- Next, check the whole document for abbreviations.
- Finally, run a spelling and grammar check on the complete document.

Checklists can serve both as a reminder of what needs doing and a record of what has been done.

Technology can be your friend, provided you use it wisely. Use the spelling and grammar checker in Word, but think about what you are doing: Take care. For example, do you really want to change every instance of "…ize" to "…ise" and end up with "the sise of the group was 35"? You can also use the more advanced features of Word or specialist software.

Taking a methodical approach requires concentration. Find yourself somewhere to work where you can focus without distractions, such as the sound of emails arriving or other interruptions.

Use common sense

The job of the editor is to achieve consistency, adhere to the style guide, aim for perfection. Right? Yes … and no.

Although we highly recommend that you use a style guide, we also caution about becoming a slave to it. Use common sense and think about the reader. For example, the style guide may specify to use numerals rather than words for all numbers and to minimise the use of hyphens, but what's easier to understand:

- We held 1 1 day meeting.
- We held 1 1-day meeting.
- We held one 1 day meeting.
- We held one 1-day meeting.

Consider your reader again when using an abbreviation: it may be widely understood by

Batch up tasks

Don't try to check everything as you work through a document: instead do sequential checks – one task at a time

Use checklists

List what needs to be done; note when you have done it

Use technology

Automate when possible and with care

Focus

Avoid distractions (email, interruptions)

Figure 1. Efficient microediting

specialists but not be familiar to generalists or the public. Take care also with an abbreviation that could have more than one meaning in your document. So, use your judgement and be prepared to explain your decision to the author.

We suggest that it's important to remember that there's invariably more than one way (or even more than *1* way!) of editing a text and someone is sure to disagree with whichever way you choose. So, be flexible, be open-minded, and remember that the English language is constantly evolving. Years ago, we were told that *ongoing* was an Americanism not fit for the pages of a respectable UK journal. Who would give it a second thought now? Be prepared to move with the times.

And perfection? Don't waste time preparing a gold standard document if bronze is acceptable for your reader. The incremental step to reach *perfection* has cost implications, in both time and financial terms. Editorial resources need to be used cost-effectively. Remember that once you have used up your budget, the money has gone.

Want to know more?

In this article, we've aimed to give you an introduction to what microediting is and what is involved in doing it. There is much more to microediting than we can cover in this article. Look out for the *Language and Writing* workshops at EMWA conferences.

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Resources

Language and Writing workshops at EMWA conferences.

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