Some notes on copy-editing

John R Hudson

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Introduction

These notes are drawn from over 30 years experience of copy-editing a wide range of academic books, largely guided throughout by successive editions of Butcher et al. (2006). Even so, my experience has been of a limited range of academic books compared with the wide range of books covered by Butcher et al. So consulting Butcher et al. for more detailed explanations of the issues which I have identified and in particular those which I have not mentioned is strongly recommended.

Copy-editing

> The main aim of copy-editing is to remove any obstacles between the reader and what the author wants to convey ... (Butcher et al., 2006, p. 1)

Copy-editing may sometimes involve making substantial changes to the text because the author has not clearly expressed their arguments but it is more likely to involve clarifying things which might be confusing to the reader like using 'last year' rather than giving the actual year. Most work tends to be around consistency in the presentation of the material and traditional copy-editors also prepared the specification for the typesetter. Nowadays, with programs like LaTeX, much of this last is just a matter of selecting the appropriate template and settings.

Conventionally, changes to a book should always be agreed with the author whereas changes to a journal article are normally the responsibility of the journal editor rather than the author though there may be times when common courtesy suggests that the author should be consulted before the article is printed.

Inevitably tact is an essential quality in a copy-editor, tact in not making changes which prevent the character of the author from showing through and in discussing any changes with the author where they involve significant changes to how to author has presented the arguments.

The structure of a book

A book always has two parts:
- the preliminary pages
- the main text

and may have back matter.

The preliminary pages are everything before Chapter 1, at very least, a title page, a page giving publication data and a contents page. The different elements in the preliminary pages are never numbered and the pages always have Roman numerals.

The main text of anything technical or scientific is normally in numbered chapters whereas chapters may be numbered or unnumbered in a literary text. Appendices are normally numbered but with a different numbering system from that of the chapters in the main text. All the pages from the first page of the main text to the end of the book are numbered using Arabic numerals.

The back matter will normally have bibliographies and indexes and may have other material which is not part of the main argument of the book. Like the preliminary pages these elements are never numbered.

Copyright and plagiarism

A copy-editor may come across copyright or plagiarism issues in the text which sometimes result in a publication having to be rejected but in most cases the issues can be resolved by correct usage and attribution.

- Short extracts of prose from almost any source may be used with an appropriate attribution, that is, the source including the page number where appropriate.
- Very short extracts of poetry may be quoted with an appropriate attribution — in other words, only a few lines and not even that if the poem is itself very short.
- Images may only be used with the appropriate permission, unless there is a clear statement that the image may be used with appropriate attribution, for example, a Creative Commons licence. Note also that there are legal obligations relating to the use of images, particularly of children, where those in the image are identifiable.

Even where copyright has expired, there should be an appropriate attribution both to enable readers to access the source and to prevent questions of plagiarism arising.

Page layout

Body text

Body text is normally in serif fonts. Books should always use broader book fonts like Latin Modern or the Tex Gyre series. Journal articles may use narrower newspaper fonts like Times Roman but may also use book fonts.

Footnotes and endnotes

As far as possible footnotes should be discouraged. If what a footnote says can be included in the main text without distracting from the flow of the argument, it should be placed in the main text. If what a footnote says is irrelevant to the flow of the text, consideration should be given to leaving it out.

That said, there are situations where important explanations need to be given which contribute to the argument but would interrupt the flow of the text. Where these are largely brief, they can go at the bottom of the page as footnotes but where they are longer consider making them endnotes.

Do not use footnotes for citations or references; use either a numerical or author-date citation system. (You can of course use citations within a footnote where appropriate to the text of the footnote.)

Headings

Headings are always in sans-serif. Chapter headings should be meaningful to the reader and short enough to fit into the top of the page as a running header.

Running headers

If there are running headers, conventionally the top right of the right hand page holds the chapter title and the top left of the left hand page holds the part title. The idea is that a right handed reader can flick through the top right hand of every page to discover a particular chapter.

These may be left out, may include the page number where it is not at the bottom of the page or may be varied if it is considered helpful to the reader. However, it is better to leave them out than to include a variation which is meaningless to the reader.

Journals often have a running footer giving the name, volume and number of the journal.

Illustrations

Illustrations should always contribute to the argument; mentioning a place and then including an illustration of it which adds nothing to the argument should be avoided.

Small illustrations may occur between paragraphs but most illustrations should be placed at the top of a page, occasionally at the bottom of a page, or on a page of illustrations. All illustrations should have a caption which should appear below the illustration.

Tables

Like illustrations most tables should be placed at the top of a page or on a page of tables. Sometimes it is practical to include small tables between paragraphs. All tables should have a caption which should appear above the table.

Language considerations

Inclusive language

Amend older male-centric words such as 'mankind,' to more neutral words, such as 'the human race' and replace masculine pronouns such as 'he' where it could mean 'he or she' with 'he or she' or 'they.'

Spelling and punctuation

Select either

- -ise and single quotes along with -re, as in centre, etc. or
- -ize and double quotes along with -er, as in center, etc. (Butcher et al., 2006, pp. 161–2)

and ensure that whichever you choose is applied consistently throughout the text.

Note that it is possible to choose -ize and single quotes but there are certain British English words which cannot end in -ize (Butcher et al., 2006, p. 159).

Many overseas locations have a local and an English spelling, for example, München and Munich. Decide whether you are going to use local or English spelling and be consistent throughout. It is not necessary to put foreign language place names in italics.

Text considerations

Abbreviations

1. Write the full name of an abbreviated organisation or element followed by the abbreviation in parentheses the first time it appears, unless it is an obvious abbreviation like UN or USA. You can put full stops after each letter of the abbreviation (U.N. or U.S.A.) but, whatever you choose, be consistent!

2. A full stop normally follows an abbreviation only if it does not include the last letter of the word abbreviated; so Mr or Dr but Prof. However, *no.* for number has a full stop and some people add a full stop after a plural abbreviation, such as vols., to be consistent with the singular vol. Whatever you choose, be consistent!

3. Consider whether to replace e.g. or i.e. with 'for example' or 'that is;' whatever decision you make be consistent throughout the text. Note that etc., e.g., i.e. and viz. are not italicised.

Braces, brackets and parentheses

Parentheses ( ) are used to enclose text which is not part of the main flow of the text and often parenthetical; they have a particular meaning in mathematics. If a whole sentence is enclosed in parentheses, the whole punctuation of the sentence is enclosed within the parentheses; if the parentheses do not enclose a whole sentence, the sentence punctuation appears outside the parentheses.

Brackets [ ] are used to enclose text which is not in the original but is added to give better sense or to replace missing text or data. Braces { } are normally found only in computer programs or mathematics.

Cross references

Where the author is using cross-references and not using LATEX to generate the output, a note needs to made that these should be checked during proof-reading.

Dates

Express decades as 1990s, other periods with an en dash between the shortest form of the years, e.g. 1984–92, unless the text makes better sense with a longer form such as, between 1984 and 1992, and non-calendar years such as the financial year, or years derived from a non-Gregorian calendar, with a slash 1987/8.

Take care with dates before 1752 when England adopted the Gregorian calendar; make sure that how you express them makes sense in terms of the calendars other people were using at the time.

Hyphens, dashes and minus signs

Hyphens, dashes and minus signs are all different characters:

Name	Unicode	Output	Made with	Used for
hyphen	U+2010	-	'-'	Word and line breaks
en dash	U+2013	–	'--'	From A–Z; pages 3–15
em dash	U+2014	—	'---'	Dash — there it goes again!
minus sign	U+2212	–	Ctl-m '-'	$x^2 - y^2 = z^2$

'Made with' refers to generating these characters in LYX.

It is now quite common for publishers to use the en dash rather than the em dash where an em dash would have been used previously. Whichever you choose, make sure that you use them consistently.

Italics

are used for

1. the titles of books and journals, plays and films and major artistic works, the names of ships and the genus, species and variety of particular flora and fauna
2. foreign words but not foreign place names
3. the names of parties in legal cases, with v between them
4. directions to the reader, for example, *see also*
5. identifying particular letters, for example, the letter h
6. emphasis — do not use bold for emphasis; this arose in the 1980s when computer printers could not generate italics and people started using bold instead.

Numbers

Small numbers, below 10 or 12, are normally written out except where

- it is helpful to match them with another number
- they precede a unit, such as 5 kg
- they express a percentage, such as 8%.

Punctuation

Commas may be added or omitted

- before 'and' where 'and' precedes the last item in a list
- after expressions such as 'that is'

but, whichever convention you adopt, be consistent.

Colons precede a list.

Semi-colons may be used where a full stop might be used to indicate a less strong separation between two statements.

Quotations

Single quotation marks have become the norm in British English with double quotation marks being placed around quotations within a quotation.

Quotations which are less than a line in length may be left inline and enclosed in single quotation marks, unless there are single quotation marks within the quotation in which case the quotation should be enclosed in double quotation marks. Longer quotations should be placed in a separate paragraph indented on both sides but without any quotation marks around them. This option may also be appropriate for shorter quotations containing complicated punctuation.

The orthography and punctuation of quotations should always follow the original orthography and punctuation though foreign quotation marks may be replaced with English ones.

Quotations should be followed by an appropriate citation.

Spaces

Typesetters recognise various sizes of space, among them, the thin space, the inter-word space and the end of sentence space which are progressively wider. In L\text{Y}X these can be entered using

`Ctl-Shift-Space`, `Ctl-Alt-Space` and `Ctl-Space` respectively. The inter-word space (`Ctl-Alt-Space`) is most likely to be needed after a full stop following an abbreviation, for example, to avoid Prof. being treated as the end of a sentence and given a wider end of sentence space.

Split infinitives

Avoid split infinitives where possible, though, occasionally, it makes better sense to split the infinitive.

Citations and referencing

Citations may be referenced using numerical or author-date systems — sometimes known as the Harvard system because an English academic visiting Harvard encountered this new system devised by Chicago University Press at Harvard and thought it had been created at Harvard University.

Before the development of computers, author-date systems avoided having to renumber citations every time the author added a new one but today bibliographic databases like BibTeX which handle renumbering automatically have removed this constraint.

The decision on which to use may depend on the publisher's house style but, where this is not a consideration, either may be used.

There are many different ways of laying out the bibliographic data in the references; if you are using a bibliographic database like BibTeX consistency can be achieved by selecting a particular style. Otherwise, you need to check that all the references are laid out consistently.

In my experience inadequacies in referencing and citation are the most time-consuming aspect of a copy-editor's work as few academics are totally consistent in their referencing. Occasionally the referencing is so inadequate that I have to remedy nearly all the citations and references in order to create a text worthy of publication; in one case, they were so inadequate that I recommended that the text should not be published.

Indexes

Only key concepts should be included in an index.

Do not include

- concepts which are included in a part, chapter or section heading
- items which are accessible in another list, for example, a bibliography or a list of illustrations

unless there is a pressing need to identify where they are referenced elsewhere in the book.

References

Butcher, J., C. Drake, and M. Leach (2006). *Butcher's copy-editing: the Cambridge handbook for editors, copy-editors and proofreaders* (Fourth ed.). Cambridge: Cambridge University Press.