

Preceded by: 8-Release to Production (RTP) Form Routing (PM6)

9-Copyediting & Manuscript Tagging (PM7)

Followed by: 10-Line Art Process (AVPM2)

Why: Copyediting is the first step in the full quality control process that is applied to printed texts. Copyediting brings uniformity of grammar and structure to the author's final manuscript. Reviewing copyedited manuscript may be done electronically or on hard copy. The copy editor's job is two-fold:

- (1) The first responsibility is to do a word-for-word reading of each manuscript using direction from PH as to level of editing desired and specific styles and reference works (i.e., Chicago Manual of Style, Webster's New World Dictionary, APA Guidelines) to be used. The copy editor makes sure that the manuscript is complete, free of language errors, and consistently written.
- (2) The copy editor's second responsibility is to code the ms, preparing it for typesetting using ETMv2 codes and to key in tables, art, photos and other manuscript elements to ensure their proper placement in pages.

Who: In-house Project Manager/Liaison, Full Service Vendor Project Manager, Copy Editor, Author

Skills Needed: Copyediting experience, including excellent English language skills, ability to correct spelling, grammar, punctuation; strong organizational abilities; attention to detail; Microsoft Word proficiency; Knowledge of Prentice Hall Style Guides; Knowledge of Discipline Specific Style Guides (APA, MLA, etc.)

Knowledge Base Needed: Knowledge of Tagging guidelines, ETMv2 coding requirements for copy editors.

TASK: Copy Editor Responsibilities

Step 1: The copy editor reads for:

- Misspellings
- Grammatical errors
- Syntax errors
- Typographical errors
- Punctuation errors
- Stylistic inconsistencies

Step 2: The copy editor also checks for accuracy and completeness of:

- Endnotes
- Source notes
- References

Step 3: Finally, the copy editor cross-checks internal references to:

- Figures/Exhibits
- Tables
- Other sections of the manuscript
- In-text references

Step 4: The copy editor is not responsible for checking facts or verifying data.

TASK: Prepping Manuscript for Copy Editor

Step 1: In-House Project Manager (PM)/Liaison OR Full Service Vendor Project Manager (FSVPM): Determine level of edit requested by editorial:

Standard

Ensure correctness and consistency. Edit for correct and consistent style in spelling, grammar, punctuation, hyphenation, capitalization, and treatment of numerals, italics, abbreviations, and alphabetical or numerical lists. Revise material that is slanderous, dated, obscene, sexist, or prejudiced. Change phrases such as “in the figure above” to a number reference. Ensure that art and text correspond. Check the numbering and completeness of references, bibliographies, and footnotes. Ensure that in-text citations match the end-of-chapter references. Add credit lines where stipulated. Ensure the agreement of table of contents with headings in text. Mark callout (citations in text) for each table, figure, footnote, and cross-reference. Keep a thorough style sheet.

Moderate

Ensure clarity and conciseness. Edit more heavily to eliminate wordiness, triteness, confusing statements, vague generalizations, changes of tense or person, mixed metaphors, and “studies” that are not cited. Edit to impose parallel construction on elements in a series and to improve organization, transitions, word choice, and overall fluency without rewriting. Ensure that headings within each chapter are parallel in construction, number, and frequency. These tasks require knowledge of good writing style (as opposed to the emphasis on correct grammar in the light edit) as well as skill in working with the author to agree on proposed changes.

Heavy

Ensure coherence and completeness. Using the author’s material, ensure the coherence, logic, and organization of individual chapters, eliminate gaps, redundancies, and jargon, delete the inappropriate material, query the author about uneven coverage within chapters. Check for appropriate and consistent tone, focus, and use of background material, introduction terms and definitions, headings, and integration of figures and tables within the text. May eliminate the use of passive voice. May reorganize format of checklists, tables, artwork, and its labeling. May suggest ideas for additional artwork and topics not included in the manuscript. May spot check accuracy of facts easily ascertainable in desk references.

Rewrite/Developmental Edit

Ensure accuracy and appropriate coverage. Using competing texts and guidelines/outlines provided by developmental or administrative editor, ensure accurate content and coverage and determine the appropriate tone, focus, and emphasis for the intended audience. Resolve apparent discrepancies in meaning in different parts of the text and impose an organization of the text as a whole, reorganizing the material as necessary to meet market needs. Content knowledge is highly desirable. The rewriter must work closely with the author and developmental editor, as well as review the ms to confirm that level of edit choice is appropriate.

Step 2: Electronic copyediting is the preferred method and should be explored with authors during pre-production and when the title releases to production. The In-house PM/Liaison should work with the author upfront to determine if he/she can work electronically in Word using the Track Changes feature. The In-house PM/Liaison should send the Electronic Workflow Guidelines to the author, explain the workflow, and show the authors a sample document to help familiarize them with how copyedits will look on screen and how to make their own edits and answer queries. For authors who are still not comfortable with an electronic workflow (or for disciplines where working online in Word may be problematic), the copyediting may be done on hard copy. In-house PM/liaison confirms steps and schedule of chosen plan with author(s) and FSVPM.

Refer to the Electronic Workflow Guidelines.

Step 3: The In-house PM/Liaison forwards copyediting instructions to the copy editor or the FSVPM, including:

- References needed such as Chicago Manual and APA guidelines
- Specific style sheet requirements (forward discipline specific copyediting style sheet, or previous edition style sheet if available)
- Art editing instructions
- Special editorial or author requests

Step 4: The In-house PM/Liaison or FSVPM hires a qualified copy editor who is suitable to the specific job at hand. The PHHE Vendor Database lists Pearson approved copy editors whose references may be shared with FSVs. The PM or FSV establish the copy editor’s availability and negotiates the cost estimate of the job based on approved budget, which should take into account the needs of the project. The PM/L inserts the estimated cost in PIMS prior to RTP routing to **Operations Specialist (OS)** to work up the production budget.

PHHE Production Vendor Detail

The screenshot shows a web-based form titled "PHHE Production Vendor Detail". At the top right, there are links for "List View" and "Main Menu". Below the title, there are navigation icons for "Find", "Reports", and "New", along with a "Save as PDF" button and a help icon. The form is divided into several sections:

- Contact Information:** Fields for Contact, Company, Address, Address 2, City, State, ZIP, Country, Work Phone, Fax, Cell Phone, email, and Web Site. A "GO" button is located at the end of the Web Site field.
- Approval and Status:** Fields for Original Approval Date, Original Dept/Staff Utilizing Freelancer, Max Payment Approval Required, and Inactive Status | Date.
- Services:** A grid of checkboxes for various services: Archiving, Artist/Illustrator, Copy Editor, Compositor, Database Build, Designer, Digital Image/Art, Full Service Agency, Indexer, Media Design/Edit, Photographer, Programming, Proofreader, Scanning, Tearsheets, Transcripts, Video, and Typesetter.
- Comments:** A large text area for entering comments.
- Classification of Payment (check one):** A section highlighted with a red box, containing three radio button options: Independent Contractor (Invoice), INC/LLC (Invoice), and Leafstone Payment.
- Identification and Metadata:** Fields for Fed Id, SS#, Creation D/T (12-10-07 01:00 PM), and Mod. D/T (12-10-07 01:00 PM).
- Additional Information:** Icons and links for "Tax & Other Forms", "Additional Contact Info", and "Portfolio".

The copy editor must type mark the manuscript (electronically or on hard copy, depending on how copyediting is done) using the codes listed in the “MS Markup” column of the “ETMv2 Tagging Guidelines”.

Step 5: For full service books, PM/L completes related sections of “Production Work Order”. For projects needing more complex direction, in house PM/L should complete the “PHHE INSTRUCTIONS TO FREELANCE EDITORS” form.

Step 6: In-house PM/Liaison or FSVPM writes a cover letter to the copy editor, relating all copyediting needs, references, style sheets, and includes a schedule (typically a batch schedule). PM/L or FSV advises the path of edited MS and order of MS reviewers, and requests up to 3 chapters for approval from copy editor or FSV.

Step 7: If In-house PM/Liaison hires the copy editor, In-house PM/Liaison issues a purchase order for the copy editor in CES using the PHHE Project Management Production Tasks Purchase Order Template. If the FSVPM hires the copy editor, the **OS** issues the purchase order as part of the overall full-service purchase order.

Step 8: In-house PM/Liaison prepares the package to send to the copy editor or FSV (electronic or hard copy). The following items should be assembled along with any other necessary materials specific to the job:

- ∞ Cover letter and written instructions
- ∞ PHHE Instructions to Freelance Copy Editors
- ∞ MS, files only for electronic workflow (including front matter (FM) and back matter (BM))
- ∞ ETMv2 Tagging guidelines and tagged sample design pages or sample tagged chapter
- ∞ Schedule
- ∞ Author Contact Information
- ∞ Art log and copies of complete art program in order
- ∞ Captions, permissions log, copies of permissions
- ∞ Blank “EDITORIAL STYLE SHEET,” and “PHHE COPYEDITING CHECKLIST” for completion by copy editor
- ∞ Purchase Order (if copy editor is hired by PM/L)

TASK: Receiving Sample and Final Copyedited Manuscript

Step 1: In-house PM/Liaison may review up to 3 live chapters on full-service titles; this review is optional based on the title and familiarity with the FSV and/or copy editor. For either titles produced in-house or at FSV, the In-house PM/Liaison may also request a sample of copyediting prior to completion of 1 chapter for new or offshore copy editors or for more complex titles where confirmation is needed that copy editor has implemented project requirements.

In-house PM/Liaison reviews sample copyediting, answers queries, gives copy editor feedback, and gives the approval to proceed or requests revised sample. Development editors or other editorial reviewers may also check sample chapters.

If review/feedback process reveals that the copy editor is not well suited to the job, a new copy editor may be hired.

Step 2: The copy editor sends completed batches of manuscript to the In-house PM/Liaison or FSVPM for review. The In-house PM/Liaison or FSVPM answers queries and then forwards the chapters to the author (by email if electronic workflow), keeping a copy of the copyedited chapters on hand for reference if the author has questions and as back up in case the chapters are lost in transit.

NOTE: For some projects In-house PM/Liaison or FSVPM review of copyedited chapters is skipped at this stage and edited MS goes directly from the copy editor to author. This workflow should be determined after manuscript needs are reviewed; In-house PM/Liaison or FSVPM should advise the author of the process.

When batching edited manuscript to authors, In-house PM/Liaison includes an Author Copyediting Review Instructions letter with each edited batch reminding the author of his/her responsibility to review the edited ms with care, word-for-word, also advising the author(s) of the desire to make content and/or design changes now rather than in pages due to potential author alteration charges. Keep a file copy of the letter.

Step 3: In-house PM/Liaison inserts all actual dates for trafficking batches to and from author in PIMS.

NO.	MILESTONE	CATEGORY	PLANNED	REVISED	ACTUAL	RESOURCES	DURATION
1.0	Text ms to production - start	Text Production	05/01/2006	03/01/2006	06/15/2006	Resource	Days
2.0	Text ms to production - end	Text Production	05/01/2006	03/01/2006	06/15/2006	Resource	Days
3.0	Instock/revised editorial/budgeted	Printing & Fulfillment	04/20/2007	04/01/2007		Resource	Days
4.0	First batch of ms to compositor	Text Production	10/18/2006	10/24/2006	10/24/2006	Resource	Days
5.0	Last batch of ms to compositor	Text Production	11/22/2006	12/18/2006	12/19/2006	Resource	Days
6.0	First pages to production - start	Text Production	11/03/2006	11/09/2006	11/15/2006	Resource	Days
7.0	First pages to production - end	Text Production	12/12/2006	12/18/2006	12/19/2006	Resource	Days
8.0	Final pages to production - start	Text Production	12/07/2006	12/19/2006	12/19/2006	Resource	Days
9.0	Final pages to production - end	Text Production	01/16/2007	01/25/2007	01/25/2007	Resource	Days
10.0	Final files/film/camera copy to printer - start	Text Production	02/09/2007	03/01/2007	03/01/2007	Resource	Days
11.0	Final files/film/camera copy to printer - end	Text Production	02/09/2007	03/01/2007	03/01/2007	Resource	Days
12.0	Bound book	Printing & Fulfillment	03/16/2007	04/13/2007	04/13/2007	Resource	Days
13.0	Instock/live date	Printing & Fulfillment	03/23/2007	04/20/2007	04/18/2007	Resource	Days
16.0	Ms To Comp/format Start	Text Production	10/18/2006			Resource	Days
17.0	Ms To Comp/format End	Text Production	11/22/2006			Resource	Days
18.0	Test File To Printer	Text Production	02/09/2007			Resource	Days
19.0	Copyediting - Start	Copyediting	08/25/2006			Resource	Days
20.0	Copyediting - End	Copyediting	09/26/2006			Resource	Days
21.0	Production launch meeting	Planning			10/13/2006	Resource	Days

Step 4: Author(s) reviews edited manuscript, responds to queries, and returns edited manuscript to In-house PM/Liaison or FSVPM for review of each batch of edited manuscript and author responses. In-house PM/Liaison or FSVPM resolves queries, and releases manuscript to composition.