Online Editing: Tips and Tricks for Ensuring a Faster and Higher-Quality Process
by Elizabeth R. Turpin and Rebecca J. Edgerton

Online editing has become more commonplace in the last five years. While some users still maintain hardcopy/computer interfacing in the editorial process, many use online only.

Both industrial companies and publishers have found computer-handled documents often to be more efficient and less expensive to fit into an overall computerized operation.

For the online editor, here are some tips and tricks to ensure a faster and higher-quality online editorial process.

Maintaining a Paper Trail

With hardcopy, the editor has a paper trail that the online editor must create to keep track of changes. Without some online record-keeping, errors creep in and sometimes are impossible to locate or eradicate.

The online editor can maintain a separate electronic notation file for basic editorial practices, such as the house style sheet, plus a separate list of requirements and decisions made for each document.

The use of some common software options that enable an editor to line out and replace copy as well as add comments on changes made can provide the needed tracking.

Records are especially important where one editor is working on multiple documents simultaneously or where multiple editors are involved in the same document, and where consistency and accuracy are the primary goals.

Editorial groups that use LANs should designate one person as a filekeeper responsible for maintaining a locked file for individual documents or sets of documents. The filekeeper also would be responsible for supervising entry and record-keeping for any agreed-upon changes until a document is distributed or the current work group has completed its task.

See ONLINE, p. 3.

Compromise and Gauging Personality Differences the Keys to Working Effectively with Engineers
by Linda Reitman

Editor’s Note: This is the second half of an article that began in the September 1997 issue of STEPS & SPECS.

As I stated in the first part of this article, I am relating my experience as an independent contractor providing ISO 9000 documentation for the engineering department of a company that was seeking initial certification.

My liaison was the quality assurance manager who reported to the company’s vice presidents. My liaison and the vice presidents, one of whom was an engineer, comprised the committee that reviewed the documentation.

Understanding Personality Types

One of the best seminars I ever attended dealt with a product called “The People Process,” which is based on the Myers-Briggs Type Indicator test.

The Myers-Briggs test is a tool, developed in the 1950s, for identifying 16 different patterns of action in people, based on four temperaments. This is not voodoo psychology. Rather, it is a test that was used so widely that it created international interest in the idea of types of people. It also revived interest in understanding personality differences.

See PERSONALITY, p. 2.
in Carl Jung’s theory of psychological types.

The People Process effectively streamlines the Myers-Briggs Type Indicator test and takes less than five minutes to complete. I have used it to type writers I have hired in my company to determine if they would be a good fit. I also have used it in my personal life to type friends and relatives so we could understand and interact with each other better. Understanding people’s differences is what it’s all about.

It is a fact that people are different from each other and that nothing is going to change them. There is no reason to change them, however, because behavioral differences are good, not bad. Using a tool such as The People Process is the best way to recognize and learn about those differences, and it is what helped me understand what the engineer was all about so I could interact with him effectively.

**Teamwork and the Art of Compromise**

Though I was the company’s outside technical writing expert, I still had to follow its template, which was different from any with which I had ever worked.

Each procedure was formatted to look like a standalone document rather than a series of procedures. In addition, the “reference” section of each procedure used a unique style to list procedures, forms and other documents that were referenced in the text of the procedure. These were just two of the styles to which I had to adapt.

Occasionally, I had to explain to the quality assurance manager why a certain style in the company’s template could not be used. At the same time, I made certain to adhere strictly to the company’s other styles.

I found that when my arguments were persuasive in favor of improved readability, the company accepted my views and recommendations more readily. Likewise, whenever I questioned something and was told the company’s reason for doing it that way, I did it their way gladly.

**Summary**

Here are some points to remember when you find yourself in a similar situation of differing points of view, whether you are an independent contractor or an employee:

- You are the expert.
- Be able to support your opinions.
- Know and understand to whom you are talking.
- Present your research and/or opinions in a professional manner.
- Accept any outcome graciously.

Because I was confident in my knowledge and research and made the effort to understand the persons with whom I was dealing, I was able to “engineer” a win-win situation. With practice, you will, too.

**Linda Reitman** is director and head writer of The Writers’ Bloc, a Costa Mesa, California, company that produces operations manuals and ISO 9000 documentation, and a member of the Orange County chapter of STC.
22 Join P&P SIG in September-October Period

by Jerry Laing

Twenty-two persons joined the P&P SIG during September and October (data for November are not available). The SIG’s membership total now stands at 306. Welcome to the following new members:

- Luette Arrowsmith (IL)
- Ann Bishop (MA)
- Tzena Breadner (Canada)
- Tina Bymaster (TX)
- Mary Campbell (TX)
- Christy Cowan (MA)
- Sherry Doffing (TX)
- Andrew Gee (CA)
- Maura Goodwin (WA)
- Julian Hacker (GA)
- Karen Kobold (WA)
- Cathy Kurzbacher (CT)
- John LaSpada (CT)
- Michael Lewis (CA)
- Jacqueline Morris (TX)
- Nipan Pringhayune (VA)
- Terri Quinlin (CA)
- Christopher Ruck (VA)
- Rita Treichler (NY)
- James Wainwright (CT)
- Carolyn Watt (Canada)
- Jocelyn Williams (AR)

Jerrold A. Laing is P&P SIG Membership team leader and a member of the San Gabriel (CA) chapter of STC.

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While substantive, or content, editing may require major changes in the text, such as moving paragraphs and rearranging sentences and revising statements, online editing can simplify this task by using cut-and-paste for block shifts to move copy around.

Using Two Screens

Online editors also should find it helpful to use two screens (either side-by-side or alternating) to test revisions and copy arrangements. In cases of major copy shifting, it’s a good idea to use a continuing “save as alternate version” file as backup until the editor decides which version to keep.

Tools for Speed and Accuracy

For increased speed with online copy editing and greater assurance of correcting grammatical and continuing content errors, several basic software features offer significant help and are even more helpful when customized and combined with macros. Such tools include spelling and grammar checkers, search-and-replace functions, internal abbreviation expansion, scripts for setting up or routing documents, and the use of shell documents and style templates.

Time is saved by eliminating extra steps, and quality is improved by ensuring that all occurrences are detected.

Spell Checker

In customizing the spell checker, the dictionary can be adjusted by adding or deleting words. If a company has changed its name or has had personnel changes, the old names can be deleted from the dictionary.

During the spell-check process, each occurrence will require verification, thus ensuring that all instances are corrected. Words that are easy to overlook during the proofing process (e.g., manger for manager, miliary for military, widow for window) should be deleted from the dictionary, forcing the spell checker to pause at each occurrence for verification.

Common typos such as teh for the and adn for and will be caught if the software has an auto correction feature, which either corrects or underlines aberrant spelling or spacing.

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Otherwise, the document should receive a thorough visual inspection, preferably by more than one person.

Occasionally editorial managers will need to remind new online editors to examine spell-checker signals carefully for errors such as University for University and not think that the spell checker is mistaking an entry because it is capitalized as part of a proper name.

Grammar Checker

Grammar checkers can be customized as well by turning off or on some of the checker entries. For example, you can tell the checker that you want to use a final comma in a series or that numbers under 10 should be spelled out.

Search and Replace

To have more control over the search-and-replace feature, you may want to select the “each instance” option rather than the option that allows for a global change of all instances without the chance for you to verify each one.

Grammatical items that require a judgment call should be done on an individual, rather than a global, search-and-replace basis to ensure accuracy in each instance.

If you know that an error has occurred and will be wrong in all instances (e.g., September 31 should be October 1), then you can use an unconfirmed, or global, search and replace because September 31 cannot be correct under any circumstances.

On the other hand, if you have a grammar problem that is a judgment call (e.g., which vs. that), then you may want to use a confirmed search and replace so you can review each instance before a change is made.

Other controls on this feature include specifying that the search be for an exact match, including capitalization. You also may want to specify that the search be restricted to whole words, meaning that the change would not apply to the interior or portions of words or to plurals if singulatrs are specified.

The search can be restricted further by specifying what portion of the document should be searched. (e.g., everything from the cursor to the end of the document or everything from the cursor to the beginning of the document) or whether the entire document should be searched, regardless of the position of the cursor within the document.

In doing multiple passes with the search-and-replace function, the key is to first determine the right sequence and then list your steps to be sure that you do not replace the wrong item initially and thus confuse the content of your document and make impossible the next search-and-replace pass.

This caveat about the need for caution when executing multiple passes of the search-and-replace function applies particularly to changes in dates, sections, references to other documents or editions, or to tables and figures.

It is always important to remember to save the original document before starting the search-and-replace function and to save often in case of a mistake. Also be sure to always return to the top of the document before starting each pass.

Abbreviation Expander

If you commonly have to type into documents a long phrase or word, the abbreviation expander will allow you to substitute an abbreviation (e.g., STC for Society for Technical Communication or fsu for Ferris State University).

To substitute the full phrase, type the abbreviation and then click the abbreviation button to secure the full, expanded term.

Summary

This article covers only a few of the many aspects of online editing, but it suggests areas for review or further exploration for both the experienced and novice online editor. Elizabeth R. Turpin, Ph.D., teaches technical communication in the Department of Literature and Languages at Ferris State University in Big Rapids, Michigan, and is a member of the West Michigan Shores chapter of STC.

Rebecca J. Edgerton is a technical writer at the engineering firm Woolpert LLP in Dayton, Ohio.
**Book Review: Nimble Documentation**

*Aids in Understanding of Corporate Documentation Systems*

by Xiomara Elena Gonzalez


She takes the reader through the documentation process—from determining the need for the document to writing the document, to determining the format, to measuring improvement.

She explains why companies must analyze the purpose of the documents they produce. Too often, writing departments are told, “We need this information.”

Escoe suggests putting all writing requests through a litmus test to prove their necessity and value to the company. I applaud her plan of attack. If the originator of the writing request cannot prove the necessity of the documentation, then it is not written. I now have the ammunition I need to streamline much of the paperwork piled up in my office. For me, the chapter titled “Zero-Based Documentation” was the most important chapter in the book.

The up-to-date, meaningful examples Escoe provides proves that she is in tune with what is happening in the real business world. Too often, documentation experts suffer from tunnel vision and can relate only to their specific writing field. *Nimble Documentation* crosses all technical writing fields.

From a stylistic point of view, I prefer having figures and...
makes the case for its stated premise causes me some difficulty. To my mind, there seems to be a curious dichotomy running throughout the book. The book presents much of its information in the form of anecdotes (some of them cute). While these stories provide a "real world" emphasis and support for the premise, they tend to distract from the universal applicability (and in some cases the seriousness) of the message.

Because the book is relatively short, compared with many of the texts that grace my office, and because it does not address many facets of the documentation process, I felt a little shortchanged in the depth to which some topics were discussed while others were covered in considerable (and valuable) detail.

I found myself asking questions such as "After a three-page discussion of the benefits of outsourcing, why is there only a cursory (i.e., three paragraph) discussion on the drawbacks?"

Overall, though, seasoned writers in the P&P field might see this book as a reminder of what we are supposed to be accomplishing in our field. Nimble Documentation contains in one location the ideas, instructions and comments I have heard during my eight years as a writer. [Nimble Documentation]

Xiomara Elena Gonzalez is a technical writer for Global One in Reston, Virginia, and a member of the Northern Virginia (Arlington, Virginia) chapter of STC.

If your proposal for a session on P&P was accepted for presentation at STC’s 1998 Annual Conference, be sure to let Jerri Houdayer, the P&P SIG’s programs and projects leader, know so the P&P SIG can publicize it.

You can reach Jerri either by phone at 310/593-8996 or by using her e-mail address, whodare@aol.com.

**Publicize Your P&P Presentation for STC’s 1998 Annual Conference**

Tom Tomasovic is an assistant vice president in the Policies and Procedures Unit of National West-minster Bank Plc. He is responsible for the production and maintenance of operating documentation for the North American operations of NatWest Markets and NatWest Global Financial Markets, the bank’s commercial and investment arms.
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An important function of the SIG is to answer questions about P&P concerns from members and nonmembers.

Compared with calendar year 1996, the number of requests received has nearly doubled, averaging one per week.

The geographic origins of these requests were the most diverse ever. Eighty-four percent came from 14 U.S. states and the remainder from three Canadian provinces.

The majority of the requests comprised two categories: career development and opportunities (28 percent) and P&P communication (26 percent).

The P&P communication category consists of four topics: flow diagramming (31 percent), and style guides, going online and “other” topics (23 percent each).

By monitoring the requests, we can see where the greatest needs for P&P information lies. As a result, under the coordination of the SIG’s public relations leader, Nancy Ford Demeter, we are developing information sheets that will help expedite responses to the increasing number of requests.

Raymond E. Urgo is principal of Urgo & Associates, a member of the Los Angeles chapter of STC and manager of the Policies and Procedures PIC.