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 agree-upon changes until a document is distributed or the current work group has completed its task.

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 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 stand-alone 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.

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.

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** (TX)
- **Tzena Breadner** (Canada)
- **Tina Bymaster** (CA)
- **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 Quinlivan** (WA)
- **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.

Letters

Although I authored the two-part article that concludes with this issue of *STEPS & SPECS*, I want readers to know that several errors in sentence construction, word usage, grammar and spelling that appear in the article occurred after I submitted it for publication. I understand the editor's duty is to correct errors in grammar, punctuation and syntax and to delete text where necessary. However, when doing so negatively affects the article's readability and reflects poorly on me, I must speak up as a technical writing professional who takes pride in and responsibility for everything I produce.

Linda Reitman, Director
The Writers' Bloc

Editor's Response:

I regret the author's disappointment with the edited version of her article that appeared in the September 1997 issue of *STEPS & SPECS*. My intention was not to misconstrue the information provided nor to malign the author's reputation. The changes I made to the article were made for what I deemed to be clarity as well as the need to work within the constraint of a limited amount of available space. The article did indeed contain typographical errors, and I apologize for myself and others who reviewed the newsletter prior to publication and failure to detect those errors.

Letters to the editor—positive, negative, indifferent—are always welcome. Send your comments to STEPS & SPECS *Editor, 1638 S. Lincoln Street, Kent, OH 44240-4449.*

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 *Univeristy* 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.

> *The keys to a successful search-and-replace pass are a determination of the correct sequence for the search and listing the steps involved in the search to avoid replacing the wrong item.*

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 singulars 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

Nimble Documentation: The Practical Guide for World-Class Organizations (American Society for Quality Control, 1998, 247 pp.), by Adrienne Escoe, is an excellent book for all persons interested in better understanding corporate documentation systems.

From the corporate executive who has just inherited a writing department and doesn't know what to do with it, to the new writer in a publications department—indeed, everyone who reads this book will find something useful to implement in the work place.

Escoe's simple-to-read style is refreshing in a field that can be described as boring. Escoe presents ideas in a logical manner.

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 ammu-

nition 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

Book Review: Nimble Documentation

Potential to Advance Cause of P&P Communicators Worldwide

by Tom Tomasovic

As a manager/supervisor of the Policies and Procedures Unit for a major international bank, I was most interested in a book that purports to provide practical guidelines on becoming a world-class documentation operation.

In many ways, *Nimble Documentation: The Practical Guide for World-Class Organizations* (American Society for Quality Control, 1998, 247 pp.), by Adrienne Escoe, lives up to its promise, and the book is well targeted to those in my position.

Though the book says it is designed to teach you how to be a world-class documentation practitioner, one need not be

daunted. Applying the book's premises will improve **any** documentation function.

At the heart of the book are three concepts: nimble documentation, zero-based documentation and litmus test. If these phrases strike you as being "cute," I see them as variations on the more common (and frequently misunderstood) term, minimalism. Indeed, I found myself responding somewhat badly to them until I saw the correlation.

The need for current, concise (i.e., minimalist) procedural documentation and for highly trained, highly skilled documen-

tation professionals to produce the document is something that cannot be restated often enough. *Nimble Documentation* adds to the body of that literature.

Certainly, much of what is said in the book has been said before in different ways. However, if the book assists only one group in improving its performance and justifying its needs to senior management, then it will have advanced the cause of P&P communicators throughout the world.

An attempt to analyze the book in terms of how well it

tables close to the paragraph where reference is made to them. *Nimble Documentation* sometimes places the examples on another page, forcing the reader to flip a page to see the example.

Escoe also on occasion goes from describing an area to giving the reader instructions without providing a smooth transition. For example, on page 42 in the discussion of hierarchy and structure, Escoe describes the importance of hierarchy and structure, provides a quote, and then gives the reader an instruction. I found this confusing.

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. ⌐

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.

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?"

and "Why are objective criteria for determining whether the documentation function should be outsourced discussed in the section covering the disadvantages of that practice?"

I also found myself wondering about the wisdom of sequences of titles (in the same hierarchies) such as "Advantages and Disadvantages of Several Document Formats" and "Format Elements" or "Currentness," "Cycle Time," "Volume" and "Cost: The Iceberg Model."

Are these questions an indication of a lack of quality in the information contained in the book? Probably not, but they seemed to nag me in my attempt to assess the book's value.

At the same time though, one should not overlook the many positive aspects of the book, including numerous examples of useful criteria for measuring the quality of documentation and the documentation function (and the persons who produce that documentation), suggestions for developing metrics to improve the documentation function and garner

support from senior management, and a list (though not exhaustive) of useful resources to assist in producing high-quality documentation.

My overall reaction as a reader and user is that the book contains many valuable examples of things to consider and ways to improve my own documentation function. I am glad to have been exposed to these ideas, and I am certain some of them will be implemented in my quest to upgrade my department.

Does the book succeed in giving you everything you need to create a world-class documentation operation? Probably not. Can its information help to make your operation better? Definitely. ⌐

Tom Tomasovic is an assistant vice president in the Policies and Procedures Unit of National Westminster 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.

P&P SIG Information Requests Double, Have Diverse Origins in 1997

by Raymond E. Urgo

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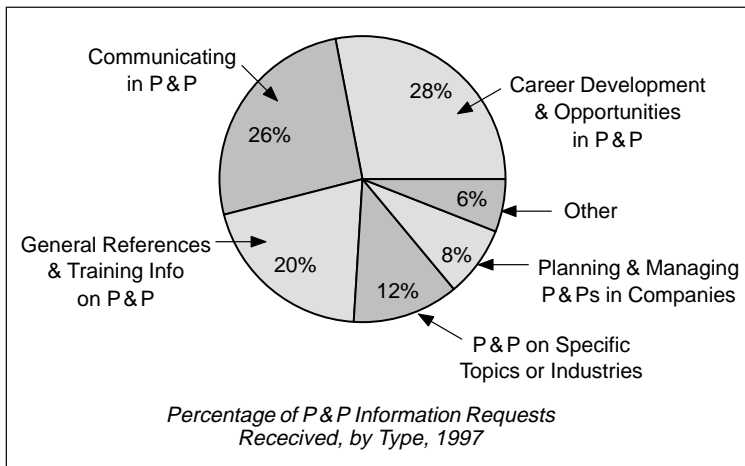
The P&P communication category consists of four topics: flow diagramming (31 percent), and style guides, going online and "other" topics (23 percent each).

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.

Percentage of P & P Information Requests Received, by Type, 1997

Pie chart segments:
- 28% Career Development & Opportunities in P & P
- 26% Communicating in P & P
- 20% General References & Training Info on P & P
- 12% P & P on Specific Topics or Industries
- 8% Planning & Managing P & Ps in Companies
- 6% Other

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