

Taming the Beast: Managing Complex, Multiauthor Edits

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BACKGROUND

- Many medical editors work on documents that are lengthy (> 200 pages), complex, and written by multiple authors.
- The authors of this poster consider the following tasks to constitute an edit:
 - Format documents to align with internal standards and any applicable external requirements
 - Correct spelling, grammar, and punctuation
 - Ensure consistency in terminology, hyphenation, numerals, and capitalization
 - Check cross-references and compare table and figure data to text
 - Ensure that abbreviations are defined at first mention and are used, as appropriate, thereafter
 - Confirm that in-text references match reference list and vice versa
 - Improve clarity and readability
 - Advise authors on organization and flow of information
- Medical editors are expected to meet rigorous standards of quality and timeliness.
- The need to deliver a high-quality edit under ambitious timelines requires that we approach complex, multiauthor documents strategically.

EDITORIAL APPROACH

Clarify Expectations

- Determine if the initial estimate of editorial time is still accurate.
 - Edits are often planned around a preliminary page count; if a document is longer than anticipated, additional editorial time will be needed to perform a full edit.
- Inquire as to whether a specific template, style guide, and reference format are required.
 - The use of an external or nonstandard template can necessitate additional formatting time.
 - Requests to follow external style guides and for the use of nonstandard referencing systems can add to editorial turnaround time.
- For documents that are longer than anticipated or that will require special editorial attention, the medical editor should clarify with the writers what tasks can be accomplished in the time allotted for an edit.

Identify Priorities

Request Feedback From Authors

- If there is insufficient time for a thorough edit, the medical editor should seek input from the writers on editorial priorities for a document.
 - Formatting, consistent use of terminology, organization, and flow may be priorities for early drafts.
 - A cross-check of citations, reference formatting, and a check of abbreviations may be priorities for final documents.
 - Specific editorial requests from clients (e.g., formatting in an alternate template, adherence to particular terminology) should always be prioritized, regardless of the status of the document.

Complete an Initial Scan of the Document

- An initial scan of the document can identify obvious discrepancies in organization, writing style, and presentation.
 - The medical editor should contact the writing team with his or her suggestions for standardizing these discrepancies, if the proposed revisions are extensive.

Develop an Editorial Style Sheet

- An editorial style sheet to document project-specific idiosyncrasies and editorial style requests from clients can streamline work on future drafts.

- Style sheets should include notes about issues such as the following:
 - Formatting (e.g., accent colors for a product-specific template)
 - Terminology (e.g., preferred terms, such as *TNF inhibitor* instead of *anti-TNF agent*)
 - Spelling (e.g., UK instead of US English)
 - Any client-specific requests that are contrary to house style (e.g., abbreviations should be used at the beginning of a sentence instead of their expansions)

Keep a List of Consistency Searches

- Keep a list of consistency searches to perform before returning an edited document to the writing team.
 - Consistency searches are most efficiently completed after the editor has read through the entire document and has encountered all potential variations in terminology and presentation.

Use Technology

Standard Technological Features in Microsoft Word

- In Microsoft Word, keyboard shortcuts, macros, and wildcards can be used to perform common editorial tasks efficiently.

Keyboard Shortcuts

- The following frequently used commands can be accomplished efficiently using keyboard shortcuts¹:
 - Insert a nonbreaking space (Ctrl + Shift + spacebar)
 - Insert a nonbreaking hyphen (Ctrl + Shift + hyphen)
 - Remove manual paragraph or character formatting of selected text (i.e., restore the style) (Ctrl + spacebar)
 - Paste special (to paste unformatted text) (Ctrl + Alt + v)
 - Redo the last action (Ctrl + y)
 - Undo the last action (Ctrl + z)
 - Insert a comment (Ctrl + Alt + m)
 - Turn tracking on or off (Ctrl + Shift + e)
 - Delete the previous word (Ctrl + backspace)
 - Insert an en dash (Ctrl + minus sign)
 - Insert an em dash (Ctrl + Alt + minus sign)
 - Change the case of selected text (Shift + F3)
 - Format selected text in all capitals (Ctrl + Shift + A)
 - Format selected text as a superscript (Ctrl + Shift + =)
 - Format selected text as a subscript (Ctrl + =)
 - Return to the previous location after clicking an internal link (Alt + ⌘)

Macros

- Common macros include the following:
 - List and highlight acronyms
 - Find author-date citations in text
 - Highlight and accept tracked changes
 - Format tables
 - Apply commonly used paragraph settings (i.e., keep with next and keep lines together)
 - Italicize and capitalize the *P* in *P* values

- To create macros, see Computer Tools for Editors, which includes over 450 macros related to writing and editing.²

- Or consider purchasing a set of macros written especially for editors (e.g., EditTools, Editor's Toolkit).

Wildcard Searches

- Useful wildcard searches include the following:
 - Add a nonbreaking space between values and units of measure (see Figure 1)
 - Replace en dashes in ranges with nonbreaking hyphens and format ranges appropriately (see Figure 2)
 - Standardize spacing around mathematical symbols (e.g., =, <, >, ≤, ≥, ±) (see Figure 3)
 - Conduct detailed cross-checks of author-date citations against a reference list (see Figure 4)

Figure 1. Wildcard Search to Add a Nonbreaking Space Between a Value and a Unit of Measure

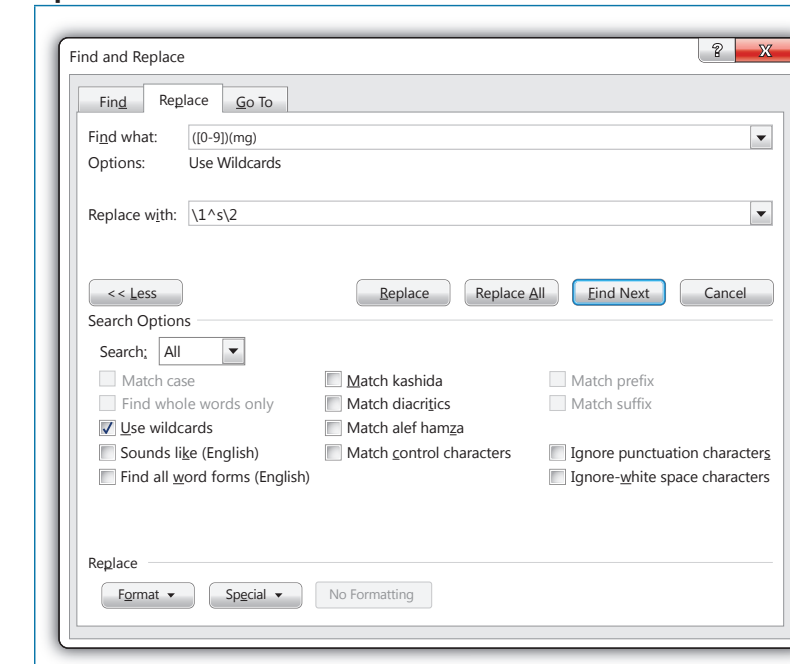


Figure 2. Wildcard Search to Replace En Dashes With Hyphens in Ranges

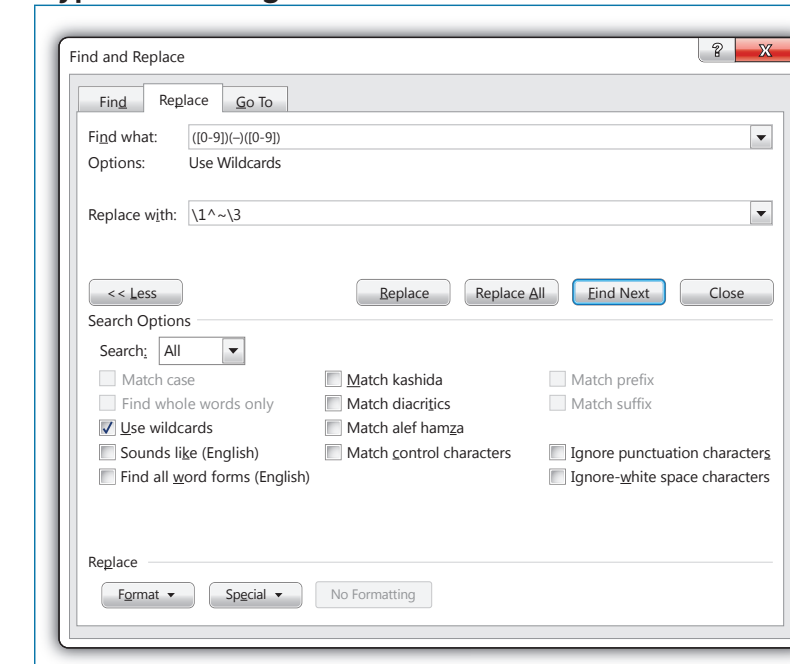


Figure 3. Wildcard Search to Standardize Spacing Around a Mathematical Symbol

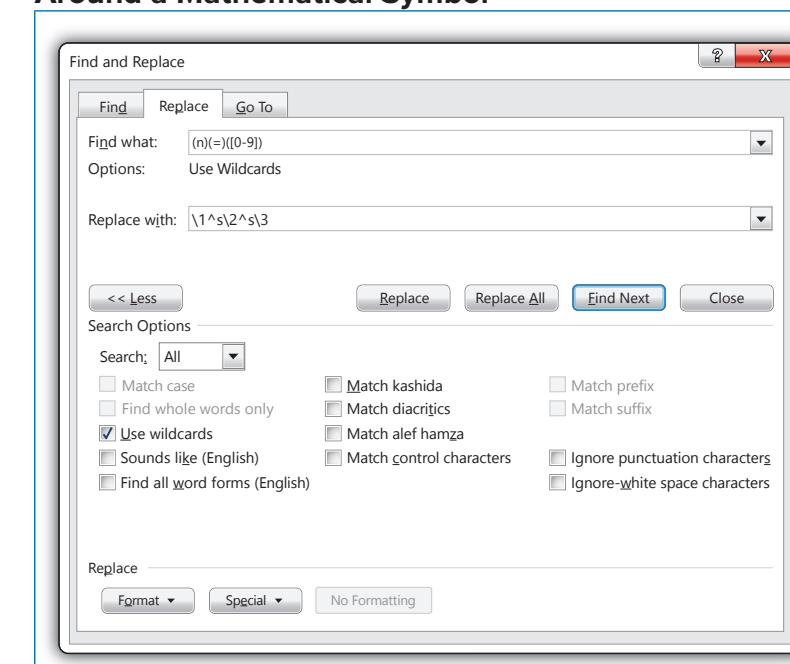
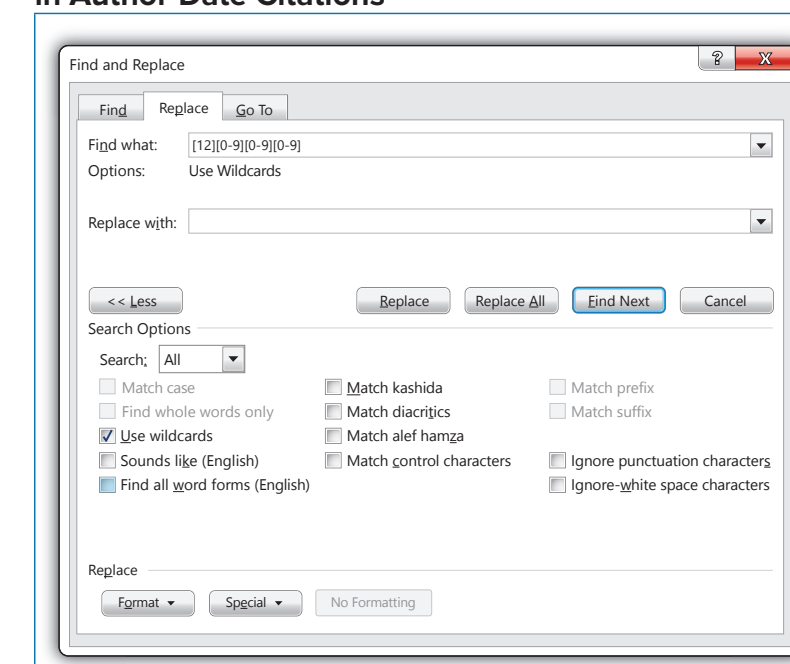


Figure 4. Wildcard Search for Publication Years in Author-Date Citations



Proofreading and Consistency Software

- Stedman's Medical/Pharmaceutical Spellchecker recognizes medical terms and branded and generic drug names to allow for efficient electronic spelling checks of medical documents.
- Consistency-checking software identifies apparent inconsistencies in a document. One such application is PerfectIt, a Microsoft Word add-in produced by Intelligent Editing Ltd.
 - PerfectIt runs the tests presented in Table 1. The authors have found the options in bold to be the most useful.
 - PerfectIt will navigate to each potential error identified in these tests. Each result must be viewed individually to determine whether it is indeed an error or an intentional variation (e.g., *base-case results* vs. *results in the base case*). The result can be fixed (with tracked changes on or off) or ignored, as appropriate.
 - For more information on using PerfectIt, see Brenner (2011),³ MacLeod (2015),⁴ and Heuman (2015).⁵

Table 1. PerfectIt Tests and Options

PerfectIt Test	Options
Hyphenation	<ul style="list-style-type: none"> Check the use of hyphens in phrases Check the use of hyphens in words Check the use of hyphens in compound words
Spelling consistency	<ul style="list-style-type: none"> Identify words spelled in British English if American English is the default spelling or vice versa Check for variations in spelling for the same term Check for the use of digits or spelled-out numbers in sentences Check for common typos Check for phrases to avoid Check for contractions
Abbreviations	<ul style="list-style-type: none"> Identify abbreviations in two forms Identify abbreviations defined two ways Identify abbreviations used before their definition Identify abbreviations defined twice Identify abbreviations used without definitions Identify abbreviations not used
Capitalization	<ul style="list-style-type: none"> Identify phrases in capitals Identify headings in capitals Check punctuation in bulleted lists Check punctuation in numbered lists Check use of capitals in bulleted lists Check use of capitals in numbered list
Bullets and lists	<ul style="list-style-type: none"> Check punctuation in tables Check use of capitals in tables Check consistency in table, box, and figure titles Check for missing table, box, and figure titles
Tables, boxes, and figures	<ul style="list-style-type: none"> Identify comments left in the text
Comments in the text	<ul style="list-style-type: none"> Generate a table of abbreviations Accept all tracked changes Remove all comments Update the table of contents Update all cross-references Convert two spaces to one Remove spaces before punctuation Generate a report of changes Compile text in comments
Document finalization	

Reference Management Software

- Reference management software can facilitate literature searches and the screening of search results, and software that interfaces with Microsoft Word (e.g., EndNote) can enhance the accuracy of data citation in a document.
- For some projects, particularly those involving lengthy and complex documents, writers should consider using EndNote to conduct literature searches, manage data resources for projects, and cite references in documents.
- If used appropriately, EndNote cite-while-you-write citations can substantially reduce the amount of editorial support needed for referencing by virtually eliminating the need for manual cross-checks of in-text citations against a reference list and manual formatting of references.
 - To maximize efficiency, EndNote must be used systematically. All authors of a document must use a single EndNote library for all citations in the document, and updates to the library must be managed carefully to ensure version control.
 - For final documents, editors should verify that all reference records cited in a document have been entered into the library appropriately and are output correctly in the bibliography.

Summarize the Edit

- If a thorough edit of a document is not possible in the time allotted for an edit, carefully document what was accomplished in the time available.
- Maintain a list of any editorial tasks that were not completed during a draft edit. These tasks must be prioritized when a later draft or the final document is edited.

CONCLUSIONS

- Providing a comprehensive review of complex, multiauthor documents within a limited timeline requires a strategic editorial approach.
- The following are recommended strategies:
 - Clarify expectations with writers
 - Work with the writers to identify editorial priorities for each draft
 - Use technology to edit and manage references quickly and efficiently
 - Carefully communicate with writers regarding what was accomplished during a draft edit and what must be prioritized for a later version

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