



EDITORS
RÉVISEURS
CANADA

DEFINITIONS OF EDITORIAL SKILLS

Editing involves carefully reviewing material before it is published and suggesting or making changes to correct or improve it. The editor must communicate clearly and tactfully with all team members, and clearly mark and convey changes, suggestions, and directions. In all cases, the editor should strive to make all changes without altering intended meaning or introducing errors.

The editor should also be aware of the legal and ethical dimensions of the publishing process, including issues involving copyright, plagiarism, libel, privacy protection, and confidentiality, and the need to address biased, non-inclusive, and offensive material.

People who edit use a broad range of terms to describe what they do. The following are definitions of the skills most commonly required for editing English-language material. The core skills are also covered in more detail in Editors Canada's [Professional Editorial Standards](#).

The definitions will be ratified by members at the annual general meeting in June 2019.

CORE SKILLS

Structural Editing

Assessing and shaping draft material to improve its organization and content. Changes may be suggested to or drafted for the writer. Structural editing may include:

- revising, reordering, cutting, or expanding material
- writing original material
- determining whether permissions are necessary for third-party material
- recasting material that would be better presented in another form, or revising material for a different medium (such as revising print copy for web copy)
- clarifying plot, characterization, or thematic elements

Also known as substantive editing, manuscript editing, content editing, or developmental editing.

Stylistic Editing

Editing to clarify meaning, ensure coherence and flow, and refine the language. It includes:

- eliminating jargon, clichés, and euphemisms
- establishing or maintaining the language level appropriate for the intended audience, medium, and purpose
- adjusting the length and structure of sentences and paragraphs
- establishing or maintaining tone, mood, style, and authorial voice or level of formality

Also known as line editing (which may also include copy editing).

Copy Editing

Editing to ensure correctness, accuracy, consistency, and completeness. It includes:

- editing for grammar, spelling, punctuation, and usage
- checking for consistency and continuity of mechanics and facts, including anachronisms, character names, and relationships
- editing tables, figures, and lists
- notifying designers of any unusual production requirements
- developing a style sheet or following one that is provided
- correcting or querying general information that should be checked for accuracy

It may also include:

- marking levels of headings and the approximate placement of art
- Canadianizing or other localizing
- converting measurements
- providing or changing the system of citations
- editing indexes
- obtaining or listing permissions needed
- checking front matter, back matter, and cover copy
- checking web links

Note that “copy editing” is often loosely used to include stylistic editing, structural editing, fact checking, or proofreading. Editors Canada uses it only as defined above.

Proofreading

Examining material after layout or in its final format to correct errors in textual and visual elements. The material may be read in isolation or against a previous version. It includes checking for:

- adherence to design
- minor mechanical errors (such as spelling mistakes or deviations from style sheet)
- consistency and accuracy of elements in the material (such as cross-references, running heads, captions, web page heading tags, hyperlinks, and metadata)

It may also include:

- distinguishing between printer’s, designer’s, or programmer’s errors and writer’s or editor’s alterations
- copyfitting
- flagging or checking locations of art
- inserting page numbers or checking them against content and page references

Note that proofreading is checking a work after editing; it is not a substitute for editing.

ADDITIONAL SKILLS

Acquisitions Editing

Evaluating proposals or manuscripts to ensure their fit with the publisher’s mandate, guidelines, and other titles, as well as their commercial potential. It includes:

- assessing the quality, originality, accuracy, currency, and significance of written expression
- estimating the editing required
- pitching selected manuscripts to the publisher or editorial committee

It may also include:

- developing relationships with agents
- contracting and liaising with writers
- researching underserved topics, themes, or trends and soliciting manuscripts to fill these areas
- identifying promising writers from whom to solicit manuscripts

Comparative Editing

Comparing the content of a translated text to its source text to ensure the translation is faithful to the original. Comparative editing often includes aspects of stylistic editing and copy editing, and should be done by an editor fluent in both the source language and the target language.

Electronic Coding or Tagging

Inserting codes or styles into a document to indicate the document hierarchy and design elements.

Fact Checking

Checking the accuracy of facts, citations, and quotes by referring to the writer's original sources or to other authoritative sources.

Also known as citation checking or reference checking.

Formatting

Creating a formatted document, web page, or ebook from an electronic file according to the client's or designer's instructions or template. It may include:

- sizing and placement of art
- setting front and back matter
- establishing design
- creating cover art
- applying CSS tags
- formatting indexes

Also known as desktop publishing or production design.

Indexing

Producing an alphabetical (or otherwise ordered) list of names, places, subjects, and concepts that appear in a work. It includes:

- reading and analyzing the work
- identifying significant subjects within the work and relationships between them
- choosing concise terms to represent the chosen subjects
- arranging terms into entries consisting of headings, subheadings, locators (such as page numbers), and cross-references

Manuscript Evaluation

Assessing the content and organization of a work, and commenting in depth on such factors as characterization, dialogue, setting, plot, structure, subject relevance, believability, research required, and potential legal issues. It also involves evaluating:

- technique and style
- clarity
- voice
- tone
- reading level
- audience appropriateness

It may include providing detailed comments on the marketability of the work and suggesting ways to make it more marketable. This evaluation is intended to guide the writer or publisher through the process of rewriting or editing the work.

Also known as critiquing.

Production Editing

Coordinating and supervising design, formatting, and proofreading stages, and ensuring integration of design and content. It may include:

- formatting
- proofreading
- inputting changes
- locating, negotiating with, and supervising designers, artists, and printers
- creating production schedules

Also known as production coordination.

Project Editing

Coordinating all stages of a project, from an initial proposal or draft material to the final product, and incorporating input from the writer and any others involved with the project. If necessary, getting all approvals throughout the process. Can also involve coordinating long-term projects, such as major websites. It may include:

- editing
- budgeting
- scheduling
- hiring or supervising non-editorial professionals, such as designers and programmers

Also known as developmental editing or editorial management.

Rewriting

Creating new material based on content supplied by a writer. It may include:

- research
- writing original material
- fact checking

Also known as book doctoring.

Visual Research

Locating suitable still images, artwork, illustrations, maps, diagrams, or footage. It may include:

- reading the work and composing lists of visuals
- preparing permissions logs
- setting and maintaining budgets
- locating copyright holders
- arranging for and supervising photo shoots
- organizing images for scanning
- acquiring images of appropriate quality in electronic file form
- preparing image descriptions and artists' biographical information
- obtaining permission releases (including model and location releases)
- writing labels, captions, or source lines
- preparing acknowledgement copy
- negotiating usage fees
- requesting licences and invoices
- sending final usage letters

It may also include fulfilling contractual obligations, such as requesting complimentary copies for contributors or sample pages for approval, updating clients' rights management databases, and submitting final permissions logs and paperwork.

Also known as image research, picture research, or photo research.

Web Editing

Editing and updating the content of web pages, including text, images, and links. It includes:

- checking links to ensure they point to the right places
- checking that link text accurately reflects where the link goes
- reorganizing or revising print copy for the web
- editing or writing web copy according to web-writing best practices
- proofreading final websites and checking for consistency on all site elements
- identifying potential copyright issues

It may also include:

- reviewing websites on multiple platforms (such as ensuring links are substantial enough for touchscreen users)
- advising on accessibility issues
- reviewing or creating information architecture
- implementing changes using a content management system