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ENG 5314   Technical Editing

Module 9-1: Technical Editing

Training Presentation Summaries

Team 1   **Editing for Global Audiences**

Team one's presentation discusses strategies for communicating with global audiences. The main topics include cultural research, translation, and globalization. The purpose of these strategies is to create documentation that can be understood by global audiences. These documents must be usable and free of slang, jargon, idioms, and American colloquialisms. These can be misunderstood by someone from another culture. Documents that adhere to these principles are also less expensive for an organization.

Technical editors should know that most workplaces are multi-cultural, and know how to work with many different cultures. Editors should understand language, culture, and locale. Additionally, customers need to be considered to satisfy the foreign language translation demands of a global professional market.

Cultural Research

A technical writer or editor needs to write simply and respectfully with clarity. They should also consider a reader's English comprehension level. For a technical editor, the world is their audience, and editors need to write documents that consider cultural differences. They must also write documents that are functional, knowing their documents will be used internationally.

Translation

As language is a verbal and written means that allows different people to directly or indirectly communicate with each other, translation is the process of translating words and text from one language to another. This allows people of different backgrounds to communicate and enjoy one another's culture. This gives the editor the ability to analyze a culture's language,

religion, shared knowledge, and behavior. An accurate translation allows the reader to understand documents easier.

Globalization

Globalization means making a document or product that is usable all around the world. A more specific definition is a language-based definition. This means writing in a single, universally understood, and used language, the lingua franca (English).

Global English has three predominant views, the colonial view, instrumentalism, and terminology management. The colonial view suggests that English has superior intrinsic and extrinsic attributes. Instrumentalism means English is a tool that allows non-native speakers to be a part of the global economy. The final view is Terminology management and controlled language. This consists of being clear and consistent in an editor's word and phrase usage throughout a document. Controlled language means assigning a singular definition to the same word or phrase through a document. Both methods help non-native speakers with language that might be confusing.

Team 2   **Self-Publishing**

The Self-Publishing presentation discusses the fields of self-publishing, traditional publishing, and how the process works. The traditional publishing process is discussed first, a process beginning with writing a book and then having a book published and ready for distribution. There are many steps for traditional publishing, and it can take months or even years to get published. Then the Self-publishing process is discussed. Self-publishing gives an author creative control, and it can be more lucrative, but there are downsides. Finally, indexing is explained: what indexing is, how it is done, the software used, the indexing process, and how much it costs.

Traditional publishing begins with writing a book, then securing an agent and publisher. Signing a contract with a traditional publisher is the final step. This can take an author months and even years of work. This makes self-publishing a great option for writers today because it simplifies and shortens the process. An author has more control over their manuscript and does not have to go through the difficulty of traditional publishing. When considering self-publishing, a writer should have a timeline and an overview of the process it takes. Authors have to know that the manuscript is in good shape; if it's not, they may need the services of a proofreader and an editor.

When publishing and printing an e-Book, an author should consider many tasks such as copyediting, developmental editing, illustrations, formatting, post-production proofreading, cover design, illustrations, copyright, and the time it takes to write. All of this can take weeks or months. Many authors have deadlines. Hiring an editor is suggested.

An author can perform copyediting on their own, but having an editor look at the manuscript is recommended. Developmental editing is when an editor critiques a manuscript's plot, characters, and themes. This is to make sure readers understand and comprehend the storyline. The next step concerns breaking the manuscript down for formatting, layout, and publishing. An author should follow specifications like fonts, styles, headings and subheadings, and page breaks. These specifications depend on which platform the author chooses to publish. Post-production proofreading is the final proofreading. This happens when editors examine the manuscript looking for major text or formatting issues. An editor will fix grammar, vocabulary, and spelling. This proofreading is more of a thorough edit than the previous step. It polishes the manuscript and makes it ready to publish.

Cover design and illustrations are the next steps. For illustrations, an author should pick a unique image for the book's cover because this will help it stand out. Children's books usually always have illustrations. Self-publishing companies can help with this, but it is good for a writer to have other artists to work with. Cover design comes next. The four tools for book covers are pressbooks, which feature automatic eBook and print cover generators. Kindle offers a simple eBook cover generator. Fiver is a marketplace where authors can commission designers for cover art, starting at five dollars. Finally, there is the Canva design tool which allows authors to create DIY covers.

Self-Publishing Companies

Kindle direct publishing is Amazon's book retailer. Publishing with KDP helps authors get their book into international markets so readers overseas have access to it. It is also free to publish and sell books with KDP, however, the cost to print an e-Book is removed from the author's royalties when the eBook is printed.

Smashwords, the first e-Book distributor, can distribute online or to stores and libraries. Smashwords has a higher level of control over pricing, making it free to publish and sell books with them.

Indexing

This section explains what indexing is, who indexers are, how it is done, the costs, software are used, and how editors and indexers are a part of the indexing process.

Indexing is the process where a written book is given to an indexer to analyze page by page and highlight important words and terms that a reader might want to find in a book, either by reference or page number. An indexer will assemble all indexable words in alphabetical order and assign the appropriate page numbers where each index term may be located in the book. The index is then added at the end of the book, typically non-fiction books.

Editors and indexers have a common goal, to diagnose and correct structural problems in non-fiction texts and product documentation. There are a couple of steps in the indexing process. First is the negotiation phase where an editor will provide the information that the indexer needs to know about a project. Then there's the indexing phase, where the indexer will create an entry for every topic and procedure. MS Word and PagePlus are the standard software used for indexing.

The presentation then discusses how indexing is done. Indexers will index the chapters of a book, create an entry for a procedure, index topics that answer who, what, where, when, and why. They will then index product names, and the parts of a book before and after the chapters, then the indexer will edit the index by focusing on the usability of the documents, create "see also" references and test the index by using the right or left-brain test or the User test.

The cost of indexing is the final part of this presentation. The price depends on the density of the index terms as well as the size and length of a book. The three main quoting methods are the Per Page rate, per locator rate, and the hourly rate. With the per-page rate, the number of index pages determines their overall charge. The per locator rate charge is based on the number of locators in the index. The simplest method is the hourly rate which is calculated by the total number of hours multiplied by an hourly rate, and the indexing speed.

Team 3　　　　　　　**Editing to Remove Bias**

Team three's Editing to Remove Bias explores the definition of bias, removing biases from ourselves and others. Bias can be implicit or explicit bias, gender, racial, disability, occupational, and political bias. Removing our own bias addresses how editors should admit they themselves have bias, and it gives ideas about how to remove bias by avoiding generalizations and using evidence to support statements. Finally, the presentation discusses how editors can remove bias from others by using analytical editing and focusing on the accuracy of the language being used.

Defining Bias

Editors need to understand the power of language when understanding what bias is and who it affects. Biased Language can marginalize underrepresented populations. Bias can apply to gender, racial, religious groups, and political beliefs. Implicit bias occurs when something triggers us without being aware of it. We learn these from family, friends, and the media. Explicit biases are preferences, beliefs, and attitudes. These are expressed in a writer's work, and they are aware of this and blatantly express their views.

Removing Bias from Ourselves

Removing bias from ourselves is the next concept that is discussed. Writers and editors must admit that they have biases and be aware of their biases in their writing. We are presented with four techniques for reducing bias, avoid generalizations, use facts to support statements, be objective and use sensitive language so readers are not offended. Editors should know the difference between a statement and judgmental language, and let readers keep their humanity by putting people first when discussing conditions and groups aforementioned. A Writer's content

must be factual and suited for their audience's reading level while knowing their readers expect accuracy. Technical terms should be used carefully.

Removing Bias from Others

When editing to remove others' biases editors should focus on the accuracy of content, and language used. These should be appropriate for a reader's reading level. Editors also remove bias from others by using Analytical Editing. This asks editors to consider the context of a sentence, or the context and content of a technical study when removing bias.

Analytical editing asks editors to define the terminology being used, whether they are editing an article or the results of a technical study. If editing a technical study editors need to know the subjects being researched, definitions of being measurements and applied, treatments being used and outcome of the study, and how the subjects fared after the study. This will let an editor know if or why this study should be published.

Team 4   **Legal Issues with Editing**

Team four discussed Legal Issues with Editing such as copyright, libel, ethics and liability. Copyright, which is defined as "the body of law that deals with the ownership and the use of original work such as literature, art or music," was explained. The ways that copyright law affects editors were also discussed. Libel, a written form of defamation, was presented. Finally, ethics and liability were discussed. Ethics is defined as set morals and obligations. Team four's presentation makes it patently clear that editors need to understand and apply this information when working. This knowledge allows them to avoid legal fines and lawsuits for issues like infringement and libel.

Copyright and Fair Use

Copyright gives the author, composer, or artist ownership and protection of their creation. When a document, piece of music, or work of art is complete it has copyright. Fair use means that someone besides the creator is using the author's work with permission. Infringement happens when someone else uses an artist's work without authorization.

An excellent example of copyright infringement is presented in the *Folsom v Marsh* case in 1841. This case was the first fair use case in US history. A man named Jared Sparks owned the copyright of President George Washington's official papers. Sparks published the papers in a 12-volume work with Folsom, Wells, and Thurston Publishing. Then a Harvard historian named Charles W. Upham, copied over 300 pages of Washington's papers and wrote his own autobiography of Washington. Marsh, Capen, and Lyon publishing published Upham's autobiography. Folsom, Wells, and Thurston discovered this and took Marsh to court. Folsom

sued Marsh for piracy of copyright. Fair use was not found in the case because the court said that the papers were copyrightable and that this was a form of copyright infringement.

Another copyright infringement lawsuit was presented, *Dr. Seuss Enterprises v. ComicMix. Oh, the Places You'll GO* is a classic book by Dr. Seuss. ComicMix published a parody of the classic book by slightly renaming it, *Oh, the Places you'll BOLDY Go*. Dr. Seuss took ComicMix to court and the court ruled in favor of Dr. Seuss Enterprises.

Intellectual property can be protected. Authors, artists, and composers can go to the US copyright office to get their creations protected. The presentation provides definitions, examples, and legal channels that authors can use to protect their creations. Providing this information teaches how important it is for editors to know about copyright, copyright infringement, laws, and ways to avoid lawsuits.

Libel

An example from popular culture was used to discuss libel. A singer named Tasha K. defamed another entertainer named Cardi B. K. and spread vicious rumors, lies, and about Cardi B. This libel case was taken to court, and all verbal attacks and rumors were proved to be untrue. K. had to pay a large fine. Cardi B. sued her and won.

Libel is the written form of defamation. Risks, defenses, and guidelines are issues editors deal with. A plaintiff has no case if a libelous statement made about them is proven to be true. What is published must also be true. The plaintiff must prove that someone had a deliberate attempt to harm them. It cannot just be a general statement about someone.

Different states have their own laws about libel. Proof of defamation, trademarks, identification, publication, and fault are the four things that must exist for libel actions to be

sustained. Libel cases rarely go to the Supreme Court. These cases are usually settled in state court where they have implications. Editors must adhere to libel laws, and only publish statements people make about other people that are completely true. Editors can lose their jobs, and editors can have their reputations destroyed. Organizations and publishers can be fined a lot of money for publishing libelous statements.

Ethics and Liability

The last part of the presentation covers ethics and liability in technical editing, and how crucially important it is for editors to know this. Ethics are defined as a theory or set of moral values, duties, and obligations editors have. Liability is defined as an obligation according to the law.

There are two types of liabilities, normative and empirical. Normative describes what is right and what is wrong. The question "What I ought to do?" is also explained as a type of liability. Empirical liability describes ethics based on laws, norms and values, and things that people talk about and deal with in everyday life.

Additionally, the presenter explains that editors must use more than common sense. Matters in the editing and publishing field can become too complicated for the mere application of "common sense."

The 1994 lawsuit between *Liebeck v. McDonald's* is cited. This was a misunderstood case by most Americans. Liebeck, an elderly woman, purchased a 180-degree hot coffee from a McDonald's drive-through. She was riding in a car with her grandson. The cup of coffee was accidentally spilled and it covered entire her lap. She experienced 3rd-degree burns and had to go to the hospital. She was awarded two million dollars by McDonald's. The company was held

liable because they did not state the obvious yet important information by putting a label on the coffee and how hot it was. The customer was a vulnerable elderly woman. While some might say that it was her fault, companies can be held liable for not stating the obvious.

Ideas about how technical communicators and editors should follow company policies were also discussed. This section focused on the company's house style guide and the information it should contain. In-house style guides should contain identification or trademarks, copyright policies, warnings, and hazards, environmental ethics as they pertain to product resources and waste, legal and ethical company conduct for employees, and required ethical behavior for employees.

Team 5   Publishing and Ethical Issues in Technical Editing

Team five's Publishing and Ethical Issues in Technical Editing presentation addresses four very important things that come up in the field of publishing and technical editing: fact-checking and hypercorrection, the four types of plagiarism, and conflicts of interest that happen in the publishing field.

Fact-Checking

Editors and publishers must fact-check and understand the importance of ethical writing to deter misinformation. News outlets and websites can spread incorrect information, which can spread to the general public causing panic, defamation, the loss of jobs, and even life. Misinformation can become news fast. Hypercorrection happens when the public hears the wrong information, shares it, and then keeps spreading it.

A lawsuit in 1969 brought fact-checking to the forefront in news reporting: the Gertz v. Robert Welch case. Gertz defended the family of a man in a civil suit who had been shot dead by a Chicago cop who was then convicted of 2nd-degree murder. *American Opinion* magazine defamed Mr. Gertz calling him a Leninist and Communist, both untrue. Even though Gertz was a private citizen, this lack of fact-checking and bad reporting damaged his reputation.

Plagiarism

The four types of plagiarism are direct plagiarism, Mosaic plagiarism, auto plagiarism, and failing to credit sources. Direct plagiarism is copying another's work without giving credit. Failing to credit sources happens when someone takes ideas from others' works and does not credit the sources where the writer found the information. Mosaic plagiarism means partially paraphrasing someone else's works without credit, and this results in a combination of original and copied material. Auto plagiarism is when someone passes off previously submitted work,

and it is marked as new material. Plagiarism robs someone of the ability to paraphrase and summarize someone else's words. This can prevent someone from fully understanding the material.

Conflicts of Interest between Authors, Editors, and Publishers

A conflict of interest happens when two or more interested parties are incompatible with or violate the practices of a business or institution. This happens when someone is expected to be neutral on an issue.

Publishers want to publish articles that make money and bolster their reputation. If an article does not meet these goals, it is rejected. Editors must balance a publisher's goals and their relationship with an author. Authors want their material published with their voices left intact, even if their material does not meet the publisher's criteria or style guide. Publishers, editors, and authors can be influenced by sources outside the publication. Editors have to deal with authors and publishers and balance different aspects of these relationships. They also must be aware of outside influences and prevent them from affecting the publication.

Editors should not be involved with the advertising side of a publication. This prevents bias in manuscript selection. Publishing staff should not have advanced knowledge about unreleased content so they cannot influence it. Editors, publishers, and authors should disclose any bias they have towards their company's management. Everyone needs to realize that the publishing field has paid placements and forces, influencing article selection. The business has a cycle of influence that starts with a publisher, moves to advertisers and readers, and then the cycle moves to authors and editors.

Team 6   **Indexing**

Team six's presentation discusses indexing, its value, what indexing is, who indexers are, and how editors and writers are advocates for readers. It discusses knowing how to choose the right terms for an index by using specific nouns and verbs to help the reader find what they need and the importance of having indexes for every main topic. The presentation teaches us how to create an index in MS Word. Indexing is a skill that writers and editors can learn and add to their resumes. It can also be used when writing a thesis or dissertation.

Indexing is part of the publishing process, and it is done after page proofs are completed. Authors usually do not index. Indexers can work in-house or freelance with their own business. Indexers should use the correct terms so readers can find the correct information fast. They need to know what readers are looking for and what specific terms readers might expect to guide them to the right information.

Indexers should index every task, concept, reference topic, and important subject within a topic. They should use specific verbs or nouns and avoid generic terms when starting every entry in an index.

Specific and descriptive terms are best when creating an index. This makes finding an entry faster for the reader. Depending on the context, some words can be specific or generic, such as creating or updating, but generic terms already have hundreds of entries. An entry like "See reference" to another term is more helpful than having the reader search the index without help. Synonyms can be used to look up terms, even though the words might not be the same in the text. This helps users find the right information in a different way. Font, size, and typeface are all synonyms.

The presentation explains that 'The' in an index can be sorted under 'the.' If the indexer is trying to ignore 'the,' it can be retained, omitted, or inverted, for example, Great Gatsby or The Great Gatsby. Use your best judgment and consider the approach to 'The.' This discussion concludes by saying that there is no "consistent approach" to the word 'The.'

Print vs. Online Index

A print index can benefit from using synonyms. A print index will have one column of entries for every 10 pages of text. If page numbers are used, they should be on the lowest level of a subentry. An online index can help the reader. However, the search function in an online index can overload it, causing too many search results. An index with more specific terms is more helpful to the reader.

MS Word Tutorial

The Word tutorial shows us how to create an index by clicking the reference tab, the mark entry option, and then clicking the insert index menu. Then the indexer will select a term and highlight it. A dialog box comes up where everything is sorted alphabetically, and the subentry, convert options, page range, and page number format options appear. The dialog box stays open so you can mark multiple index entries. This portion shows us how to create an entry and an index on our own.

The video efficiently discusses the value of indexes and indexing. It teaches us to advocate for the reader, choose specific terms for an index, and have one for main topics. Team six taught us the skill of indexing by showing us the MS Word Mark Entry and Insert index procedure.

Team 7   **Document Design**

       The document design presentation explores how layout, visual organizers, rhetorical principles, and strategies for consistent formatting of data complement visual layout applies to the document design discipline. Additionally, the presentation addresses the integration of consistent application of color, icons, and labels. These visual layout strategies create an overall feeling for the audience with the goal of keeping the visual structure consistent for the audience to grasp. The goal of a layout is to create a psychological effect on the reader that elicits emotion through color choice. These elements affect the tone of the document.

Typeface, Typography, and Font

       The presentation then explores adding style to text, typography, typeface, font, the hierarchy of text, tone, legibility, and finding the right typeface. Honing the skill of document design, the importance of consistency in visuals, and choosing the correct typefaces to meet the needs of the audience are also covered. Document design is emphasized as an essential skill for technical communicators. Additionally, viewers of this presentation learn that visuals can set a tone for an organization, and this can influence the way a reader sees the organization. The audience learns that typeface and font complement each other because they both are collections and styles of

designed glyphs, which consist of various sizes and weights such as serif, sans serif, and decorative.

Legibility, Tone, and Hierarchy

Legibility, tone, and text hierarchy complete the presentation. The text must be easy to read and spacing must be consistent. The tone of the document should fit the typeface. When these elements are applied to the document it increases a reader's interest and attracts them to the document. Headers, Sub-headers, and typefaces can stylize and organize text, thus creating a hierarchy that makes the document easy to understand. Typefaces must match the tone and text.