Editing with Style

An editor's guide to preparing a manuscript for publication

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Author's Note

IN MY NEARLY TWENTY-YEAR CAREER AS AN EDITOR, among the most useful professional skills I have developed are those which pertain to the mastery of Microsoft Word and its capabilities. For example, using paragraph and character styles makes it so much easier and more enjoyable to work with document formatting. Understanding and making full use of Word's Find and Replace capabilities makes repetitive tasks much, much easier and quicker.

Most of those who "hate on" Word don't understand it. Taking a few hours to understand it now will reward you many, many times over with greater efficiency, productivity, and enjoyment in your work.

This guide makes use of everything that I am teaching you—it is a living example of the things it teaches. As you read this guide, I would encourage you to explore it and see how things are done.

My hope is that you will learn to appreciate the power of Word as an editing platform, and its beautifully-designed underlying simplicity.

Sean Harrison
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Manuscript Template Linking

The manuscript you have received from the author or previous editor might or might not have a template attached to it. You need to attach the "BookGenesis-Manuscript" template to the manuscript before you continue, because this template contains the automation scripts, keyboard shortcuts, and styles that you will be using to prepare the manuscript for production.

What Is a Template?

In Microsoft Word, there are two kinds of files: regular documents, and templates. A regular document is just that: A document containing content. The manuscript you are working with is a regular document.

A template is a special kind of document: It contains style definitions, keyboard shortcuts, and "macros" (scripts that run inside Microsoft Word). It can also contain a "template" of text that you can use to start working on your document.

The important thing about a template is that a regular document can be "linked" to a template. When you have created that link, all of the style definitions, keyboard shortcuts, and macros that are in the template are available to you when you are editing the document — you don't have to open the template in order to make use of the things it contains.

Linking a Document to a Template

There are two methods to link a document to a template: (1) Create a new document based on the template. (2) Link an existing document to the template.

Method 1: Create a new document based on the template

1. Use Windows Explorer (on Windows) or the Finder (on MacOS) to find "BookGenesis-Manuscript.dotm" on your system. It will be in the folder bg-

editor, under "Templates". The extension (`.dotm`) might not appear in the Explorer/Finder window.

2. Double-click the template file. It should open a new document based on the template — in the title bar at the top of the screen, it should say "DocumentN", where N is a number. If it says "BookGenesis-Manuscript", it means that you are editing the template itself, which is not what you want. In that case, you should use method 2, below.

3. **Open** the existing manuscript file, **select** the entire text of the manuscript (`Ctrl+A` on Windows / ⌘+A on MacOS), **copy** the text (`Ctrl+C` / ⌘+C), and **close** the manuscript file.

4. **Select** the entire text of the new document you created in step 2, then **paste** the entire text of the manuscript into the document (`Ctrl+V` / ⌘+V). You now have a document that is linked to the BookGenesis-Manuscript template.

5. **Save** the manuscript to your working files. You will now be working with this copy of the manuscript going forward.

Method 2: Link an existing document to the template.

This is the quickest approach.

1. Open the existing manuscript file. You can do this from Explorer/Finder or from within Word.

2. Link the manuscript file to the BookGenesis-Manuscript template.

    a) Open the "Templates and Add-ins" dialog. The way to do this is system-dependent.

        MacOS: Use the menus at the top of the screen, select "Tools » Templates and Add-ins…"
        Windows: [TODO]

    b) Under "Document template" (at the top of the dialog), click the "Attach" button. Browse your filesystem to find the BookGenesis-Manuscript template, and click "OK". Make sure the "Automatically update document styles" checkbox is checked.

    c) Close the "Templates and Add-ins" dialog. The manuscript is now linked to the template.

Once your manuscript is linked to the BookGenesis-Manuscript template, you are ready to continue with manuscript cleanup and styling.

2

Manuscript Cleanup

Introduction

Manuscripts that arrive from authors often have a variety of common formatting errors in the text itself. Many of these errors are predictable — double spaces and returns, incorrect dashes and ellipses and quote marks, underline instead of italic, and so on. There is no reason for the editor to fix these issues by hand when they are so predictable. Instead, we have provided a set of automated manuscript cleanup macros to make this process as painless as possible.

The best time to do this is before the manuscript has been edited, for a couple of reasons. First of all, as an editor, I have always found these kinds of formatting errors to be distracting to the higher-level review and editing process — I get sucked in to fixing quotes when I should be reading for meaning. But if the cleanup is already done, I find that I am able to read much more quickly and efficiently.

Second, although the automated cleanup processes are very good, they are not and cannot be perfect. It makes sense to run them first, so that later editors can make corrections where the automated cleanup may have erred.

If it is not possible to run the automated cleanup macros before editing, then it is still probably valuable to do it. It does, however, mean that a robust proofreading stage should be included, just to make sure that everything is as it should be.

Running Macros

To run a macro in Word, (a) open the "Macros" dialog, (b) select the macro you wish to run, and (c) press "Return/Enter" or click "Run".

To open the Macros dialog, you can use one of the following methods:

Cross-Platform: Press `Alt+F8`.
MacOS: Use the menus to browse to "Tools » Macros » Macros…"
Windows: [TODO]

Cleanup Macros

The following cleanup macros are provided by the BookGenesis-Manuscript template. They can be used individually or in combination, and the order in which they are used does not matter (*except* as noted under "ReapplyParagraphStyles", below).

CleanupManuscript

This macro does everything in the following macros in one go. Use this if you want the quickest, most direct, and most automated cleanup.

FixWhitespace

Fix and normalize whitespace in a variety of contexts.

- four spaces become a tab
- two spaces become one
- tab+space and space+tab become tab
- tab+¶ becomes ¶ (paragraph return)
- ¶+space and space+¶ become ¶
- Multiple ¶s (paragraph returns) become one
- Remove space before closing punctuation (period, comma, colon, semi-colon, question mark, and exclamation point)

FixDashes

Fix and normalize en (–) and em (—) dashes in the manuscript.

- Double-hyphen (--) and hyphen surrounded by spaces (-) are converted to em dash (—).
- Hyphen in curly braces {-} is converted to en dash (–).
- Spaces are removed from around en and em dashes.

FixEllipses

Fix and normalize ellipses in the manuscript. Uses the non-rigorous four-dot method, as described in Chicago Manual of Style, 15th ed., § 11.

- Replaces Word ellipses characters (…) with three dots separated by non-breaking spaces (. . .), which is the correct "publication" form for ellipses.
- At the end of a sentence, the period is followed by the ellipses. In the middle of a sentence, only three dots are included.
- The 3-dot ellipses are always surrounded by space. If there is a fourth dot, it represents a period for the preceding sentence, so it has no space in front of it.

RemoveManualBreaks

This macro removes manual page and section breaks from the manuscript, so that the page and section breaks can be handled in the style definitions.

Note: Some authors and editors use manual page and section breaks. We have found that it is usually best to avoid their use in manuscripts and to let the typesetter define page breaks based on paragraph styles or by other means during typesetting.

The only time when section breaks make sense is when the manuscript contains multiple sections of footnotes or endnotes, and these sections must renumber from 1 with every section (for example, every chapter).

FontFormattingToCharacterStyles

This macro converts all "direct" font formatting in the manuscript to character styles.

It is always better to use character styles instead of direct font formatting. For that reason, the BookGenesis-Manuscript templates defines the following new character styles, and assigns them to the keyboard in place of "direct" formatting:

Currently Supports: Bold, Italic.

ReapplyParagraphStyles

Reapply the paragraph style to each paragraph in the document. Results in the removal of most formatting that is not in the style definition.

Note: This macro should be run *after* "FontFormattingToCharacterStyles." When ReapplyParagraphStyles is run, it might remove "direct" font formatting, such as bold and italic. However, it will not remove character styles applied to the text. So running FontFormattingToCharacterStyles first will ensure that bold and italic text in the manuscript is retained through the cleanup process.

3
Manuscript Styling

Introduction

Most people who use Microsoft Word to write do not know anything about how to communicate the *structure* of the document. Instead, they use a variety of "direct formatting" in order to try to make the document *appear* the way they want it to appear. For example:

- Direct bold and italic to indicate headings and in-text emphasis.
- Direct tabs and paragraph indents to indicate paragraph structure.
- Manual page breaks (or even multiple paragraph returns!) to break a new page.

This approach is good enough for personal letters or internal memos, but it is insufficient and error-prone for the purposes of professional publication. It fails to communicate to designers and typesetters what is truly intended, and it creates unnecessary extra work for them. "I will show you an even better way" (1 Cor. 12:31) through the use of paragraph and character styles.

Paragraph and character styles in Microsoft Word provide a way for editors to communicate the structure of the document to design and production. This is invaluable for the editor and for the publishing process: It makes the intent crystal clear. In addition, once an editor has mastered the use of styles, it forever removes wrestling with formatting, and replaces it with precise control of exactly what the manuscript is saying.

I have taught dozens of editors to use paragraph and character styles during the editing process. Once they overcome the initial learning process, they become enthusiastic about styles. It becomes a natural part of the editorial process — often, the first thing an editor does after automated cleanup. Formatting is no longer a chore or a bugbear, but something that can be well-understood and controlled completely. Several have commented that they could not imagine editing without using paragraph and character styles. Once you master this skill, you might even find yourself thinking the same thing.

Paragraph Styles: Paragraph-Level Structure and Meaning

Paragraph styles communicate structure and meaning at the level of the paragraph. Rather than saying "This paragraph has the first line indented," which doesn't mean anything, we can say, "This paragraph is normal body text." Rather than saying "This paragraph has a larger font and is centered," which doesn't mean anything, we can say, "This paragraph is a Chapter Title," which has a very clear and precise meaning.

In practice, using paragraph styles releases the editor from having to worry about formatting, so that the editor can focus on meaning. The meaning of the text is represented by the words, while the meaning of the document structure is represented by the paragraph styles used. Structural meaning supports textual meaning.

Character Styles: Word-and-Phrase-Level Structure and Meaning

Character styles are used to communicate structure and textual meaning at the level of words and phrases. For example, an inline heading at the beginning of a paragraph is best represented by a character style named something like "Head 3 Inline" (with the number based on its position in the document hierarchy).

Character styles are much more reliable and robust that direct font-formatting in Word. Direct font-formatting might not be preserved when you apply a new paragraph style to a given paragraph,[1] but character styles will always be retained. (This is one of the reasons that it is important to use character styles rather than direct font formatting.) For example, some authors will italicize whole paragraphs to indicate a character's internal dialogue or, in a different context, the text of a letter to another person. These italics will often be removed if they are applied as direct font formatting, but they will be retained if applied using an Italic character style or, better in the case of whole paragraphs, a different paragraph style.

Another advantage of using character styles instead of direct font-formatting is that the designers can easily use a different typeface for bold, italic, smallcap, and other formatted text. For example, some designs always use a different typeface, or a different weight than the "bold" weight, for terms that are bolded in the text. Direct bold formatting does not provide this ability, but the designer can easily indicate that the "Bold" character style should use any typeface they choose, not just the Bold weight of the typeface that is used in the text. Using character styles gives the designers great flexibility without requiring them or the typesetter to make changes to the text itself—they need only change the definition of the character style.

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[1] The rules governing this behavior are somewhat murky. Generally speaking, if the direct font formatting covers more than 50% of the text of the paragraph, it is in danger of being removed when a paragraph style is applied to the paragraph. Let the editor beware!

(That is what I have done in this document: The "Bold" character style is assigned to the same sans-serif typeface as is used for headings, while the main body text font is a serif typeface; thus the "Bold" character style can be used for inline headings in a way that communicates structure through design. This would not be possible with direct bold font-formatting.)

Because character styles are so important for production-quality manuscript preparation, we have included three character styles in the BookGenesis-Manuscript template, and these character styles replace direct font-formatting on the keyboard:

Bold: assigned to `Ctrl+B` / `⌘+B` (in place of "direct" bold)
Italic: assigned to `Ctrl+I` / `⌘+I` (in place of "direct" italics)
Smallcaps: assigned to `Ctrl+Shift+K` / `⌘+Shift+K` (in place of "direct" smallcaps)

In Microsoft Word, only one character style can be applied at any given time. For example, if the "Bold" character style is applied, the "Italic" character style cannot also be applied. Instead, an additional character style is needed: "Bold Italic".

The use of character styles named "Bold", "Italic", "Smallcaps" and so on is a compromise. It would often be better to use character styles that are named for the intended *meaning* rather than the *appearance* of the text. For example: "Emphasis" rather than "Italic", "Inline Head" rather than "Bold", and so on. However, in practical use it is often much easier to use "Bold" and "Italic" and the like. What is most important is that you find the compromise that is most sensible for your context. How many different character styles can you keep track of and use consistently? What are the formatting requirements for your publication?

A Word about Style Names

Microsoft Word comes with a large number of styles, and those styles are named very sensibly to communicate the intended meaning. For example, normal running body text paragraphs have the style name "Body Text"; lists have the name "List"; the first-level of a table-of-contents entry is "TOC 1". These style names are clear, direct, and understandable. Whoever designed Word's built-in styles did an excellent job, especially considering that the style names chosen had to be useful for a wide variety of writing / editing /publishing situations—not just book manuscripts, but also letters, memos, newsletters, and every other kind of document. It really is remarkable.

Nevertheless, there are shortcomings and limitations in the built-in style system. Through long use, I have found that the best solution is to add to Word's built-in system with additional styles that provide additional structure as needed for a given

genre. For book publishing, the built-in styles are mostly sufficient. Other genres will find it necessary to add other sets of styles.

In all of this, it is my *strong recommendation* that the style name system be based on Word's built-in system as much as possible, and follow the same philosophy of clear, direct, and understandable style names. For instance, new styles should use whole words separated by spaces.

Some publishers have legacy systems based on extremely cryptic style names. The vendors of these legacy systems have convinced their customers that they must use these cryptic style names. There is, however, no advantage to the use of these style names for publishing, while the disadvantages are several: Difficult to learn and remember, hard for new editors to master, impossible for authors to understand and appreciate. Style names are just names, and well-designed automated processing system should be able to use any style names that the editors, designers, and typesetters choose. Since that is the case, clear and understandable style names are best: They are easiest to learn, they communicate clearly, and they remove unnecessarily impediments to the publishing process.

How to Apply Styles in Microsoft Word

There are several ways for the editor to access and apply the available styles:

- The "Styles Pane" button, on the far right side of the Home ribbon, will show the styles that are available in the manuscript / template. Double-click a style to apply it to the currently-selected text.
- Some of the available styles are bound to the keyboard as keyboard shortcuts. Please see the accompanying document, "BookGenesis: Manuscript Styles" for a list of the styles and shortcuts provided by the BookGenesis-Manuscript template.
- BookGenesis-Manuscript also provides a keyboard shortcut, `Ctrl+Alt+S` / `⌘+Alt+S`, which brings up the "Style" dialog. This dialog is my preferred way to apply an arbitrary style to the manuscript, because you can type the first letter of the desired style to move to that part of the list. Pressing "Enter" or clicking the "Apply" button will apply the style to the selected text.

When the cursor is in a single paragraph, or when you have multiple paragraphs selected, the paragraph style that you choose is applied to those paragraphs.

Sections of the Manuscript

Here I simply list the paragraph styles that you should use for various sections of the book manuscript, along with the meanings of these styles.

Title Page

Title   The title of the manuscript

Subtitle   The subtitle of the manuscript

Author   The author of the manuscript

Publisher   The publisher's name and city. Use a *soft return (a.k.a. line break)* to separate the publisher's name from the publisher's city. A soft return is `Shift+Return` in all versions of Word.

Copyright Page

Copyright   Apply this style to most of the paragraphs on the copyright page, except as noted below. These paragraphs are generally in a smaller typeface, with space above and below, and no indent.
When a single line space is desired between two lines, use a *soft return* (`Shift+Return`) rather than a separate paragraph.

Copyright First   Use this style for the first paragraph on the copyright page. It includes a page break in the style definition.

Dedication

Dedication First This style should be used for the first paragraph on the dedication page. Use *soft return* to create line breaks within a single dedication paragraph. This style includes a page break.

Dedication   Additional dedications should use this style.

Table of Contents

TOC Title   Use this style for the TOC title rather than Front Back Title, because Front Back Title is included in the TOC, whereas the TOC title should not be.

TOC 1   The first level of a table of contents (chapter titles, etc.)

Other Front and Back Matter

Front Back Title   This style indicates the title for a section of front or back matter: Acknowledgments, Colophon, Foreword, and the like.

Chapter Headings (Chapter Number and Chapter Title)

Chapter Title   This paragraph style is used for the chapter number and title at the beginning of each chapter.

Chapter Number   The Chapter Number *character* style is used in the Chapter Title paragraph before the chapter title itself. If your book has both chapter numbers and titles, use a *soft return* (`Shift+Return`) to separate the chapter number from the chapter title.

It is also advisable to use a SEQ field for the value of the chapter numbers, so that your chapters will be automatically numbered. The field looks like this: `{ SEQ chapter \n }`. To create this field, use the "Insert Field" menu / ribbon entry, and type the following text: `SEQ chapter \n` (or just copy and paste the chapter numbers from this document!).

Note: Use fields for automatic numbering. Word has the ability to include automatic numbering in the paragraph style, but it is poorly implemented, so using it is ALWAYS a mistake.

Headings

Note: Word's built-in system includes "Heading 1" through "Heading 9", but these should not be used: "Heading 1" is equivalent to "Chapter Title", not to "Head 1". Word styles can have an "outline level" applied to them; the outline level is used to indicate the structure of the document. "Heading 1" through "Heading 9" have outline levels 1 through 9 applied to them, and this cannot be changed. In the manuscript, Chapter Title and Front Back Title have outline level 1, "Head 1" has outline level 2, and so on. This is, in fact, why we have defined "Head 1" for headings in the body of the document.

Head 1   First-level heading inside the body of the document.

Head 2   Second-level heading inside the body of the document.

Head 3   Third-level heading inside the body of the document.

Body Text Styles

Body Text A "regular" paragraph of text in the body of the document.

Body First The first paragraph of text at the beginning of the chapter.

Body After Head A paragraph of body text immediately following a heading (Head 1, Head 2, Head 3)

Body Section A paragraph of body text that begins a new section without a heading. (Depending on the design, these paragraphs might or might not be preceded by a dingbat paragraph. Editors should not worry about these design details and should just use the Body Section style for these headless section breaks.)

Lists

Note: Word includes a large number of numbered and bulleted list styles. It is *strongly recommended* not to use them, because of the wonky way that Word handles automatically numbered paragraphs. Instead, bullet characters and fields, as described under "Automatic Numbering," below.

List 1/2/3 can be used to create an outline. You can also define Poetry 1/2/3 based on List 1/2/3.

List A list paragraph that is not indented—i.e., "level 0".

List 1 A list paragraph with level 1 indent

List 2 A list paragraph with level 2 indent

List 3 A list paragraph with level 3 indent

Tables

[TODO]

Images and Captions

[TODO]

4

Automatic Numbering

(and Other Useful Fields)

[TODO]

List Numbers

I recommend the LISTNUM field for all numbered lists. The LISTNUM field has the following characteristics:

- There are three kinds of LISTNUM fields: "number", "outline", and "legal". The format of the numbers for each kind of list is fixed and cannot be changed. Choose the kind and level that matches your desired number format.
- Each kind of list can have up to 9 levels. The numbering of nested list items automatically reflects the level of the item. For instance, all level 1 items will number sequentially, and level 2 items will number sequentially inside each level 1 item.
- The numbering of each list starts at 1 (or the equivalent of 1) at the beginning of the document. If you want to start a list at a different number, you can add a flag that indicates what number to start with (e.g, \s 1 means start with 1).

Regular Numbered Lists

`LISTNUM NumberDefault \l 1`	2)
`LISTNUM NumberDefault \l 2`	a)
`LISTNUM NumberDefault \l 3`	i)
`LISTNUM NumberDefault \l 4`	(1)
`LISTNUM NumberDefault \l 5`	(a)
`LISTNUM NumberDefault \l 6`	(i)
`LISTNUM NumberDefault \l 7`	1.

```
LISTNUM NumberDefault \l 8                          a.
LISTNUM NumberDefault \l 9                          i.
```

Outline Lists

```
LISTNUM OutlineDefault \l 1                         III.
LISTNUM OutlineDefault \l 2                         A.
LISTNUM OutlineDefault \l 3                         1.
LISTNUM OutlineDefault \l 4                         a)
LISTNUM OutlineDefault \l 5                         (1)
LISTNUM OutlineDefault \l 6                         (a)
LISTNUM OutlineDefault \l 7                         (i)
LISTNUM OutlineDefault \l 8                         (a)
LISTNUM OutlineDefault \l 9                         (i)
```

Legal Numbered Lists

```
LISTNUM LegalDefault \l 1                           4.
LISTNUM LegalDefault \l 2                           4.1.
LISTNUM LegalDefault \l 3                           4.1.1.
LISTNUM LegalDefault \l 4                           4.1.1.1.
LISTNUM LegalDefault \l 5                           4.1.1.1.1.
LISTNUM LegalDefault \l 6                           4.1.1.1.1.1.
LISTNUM LegalDefault \l 7                           4.1.1.1.1.1.1.
LISTNUM LegalDefault \l 8                           4.1.1.1.1.1.1.1.
LISTNUM LegalDefault \l 9                           4.1.1.1.1.1.1.1.1.
```

Other Automatic Numbers

[TODO]