

# My 27<sup>th</sup> STC Annual Conference

STC Technical Communication  
Summit, Dallas Texas

Presented to STC-SD

9 June 2010

# Topics for tonight

- Keynote
- What I attended
- What I learned
- What I presented
  - Bonus: Slides from the full workshop

# Erin McKean: Honorary Fellow & Keynoter

- Dictionary evangelist
- Chief consulting editor of American Dictionaries for Oxford University Press
- CEO of [Wordnik](#)
- Funny, on-message, and smart!
- For more: click [here](#)



# What I attended

- Content Strategies: the Content Lifecycle--Rahel Bailie
- Developing a Structured Content Strategy--Ann Rockley
- Managing Documentation Projects in a Collaborative World-- Larry Kunz
- STC Body of Knowledge Update--Connie Kiernan
- Status of Certification for Technical Communicators-- Steve Jong
- SAC Lunch
- Exhibit events, awards banquet, various hallway chats, and other things I can't remember!



# What I presented

- [Edit Online Like a Pro](#)
- Co-presented with Michelle Corbin from IBM
- Full group of slides at end of tonight's presentation



# What I learned

- From Keynote Speaker: have fun and be comfortable knowing that not everyone will understand our love of words and language
- Content Management: it's here and it makes life easier. Figure out how to make it work in your workplace
- Single Sourcing: mandatory for doing more with less—if you're in a big shop and not doing it or planning for it, you'd better change professions
- Managing Change: continuous change is part of our lives. Make the most of it.
- Networking and connecting: Still my favorite thing to do. Made time for it and reconnected with several folks I lost touch with during my STC Board years
- Value for time and money: Phenomenal.

# “Edit Online Like a Pro” Slides

- Types of edits
- Editing comments
- Audience
- Exercise 1: Editing online in plain text
- Editing online in Microsoft Word
- Editing online in Adobe Acrobat
- Exercise 2: What would you do (considerations and methodology)
- Discussion questions

# 1

## Types of edits

# Types of edits

- Copy edits
  - Textual markup of language
  - Grammar, punctuation, style
  - Focus: Sentence-level, word-level
- Substantive edits
  - Inserting queries or comments about the content
  - Organization, usability, logic
  - Focus: Topic-level, paragraph-level

## **Note:**

Substantive edits often include copy edits (to some degree), but copy edits usually done separately from substantive edits

## **Note2:**

Online editing is not editing the source directly, at least as we define it; We feel you must show your markup and insert comments that writers must respond to or address in the source themselves.



2

Editing comments

# Types of editing comments

- What is a comment? A statement that an editor makes to improve the information. Comments can be imperatives, suggestions, opinions, or queries.
- Types of comments:
  - Imperative - an editing comment based on facts, guidelines, standards, or requirements and that must be addressed in some way
  - Suggestion - An editing comment that presents an alternative way to address a problem and that the writer can choose to implement
  - Opinion - An editing comment that represents the opinion of the editor and does not reflect a specific guideline, standard, or requirement.
  - Query - An editing comment that aims at pointing out ambiguity of information, or that expresses a need for the editor's enlightenment.

# Writing effective editing comments

- How you say it: tone
  - Can set the stage for your relationship with the writer and affect the outcome of the edit.
  - Affects how well you and the writer collaborate to produce quality information.
- What you say: content
  - Include helpful information and details that ensure that the writer understands what change is needed.
  - Use positive reinforcement to build confidence and ensure that the writer continues doing the things that are well done.
- How you present it: style
  - The manner in which you present your comments to the writer can affect how they are received and whether they are incorporated.



3

Consider your audience

# Just who IS your audience?

- Editors must always know the audience for the text that they are editing, but....
- Writers are a second audience that editors must address; your markup and comments must:
  - Adhere to the same standards, guidelines, and quality that the writing must adhere to
  - Be sensitive to the status and culture of the writers (executives, countries, time zones)
  - Help the writers learn how to be better writers, to improve what you get the next time around
  - Reflect or refer to the tools and technologies that the writers use

# Standards and styles

- Develop your own standard or style
  - Fixing it yourself
  - Suggesting how they can fix it
- Be consistent with how you present your edits
- Familiarize your writers with your style, ask for their feedback on what works or doesn't work
- Establish personal contact
- Process is important!
  - Establish it
  - Communicate it
  - Stick to it

# 4

Exercise #1, Editing  
online in plain text

# Exercise #1: Editing an e-mail message

- Take 5-10 minutes to consider how you would edit this email for an executive
- Consider not just the type of edit but how you would represent your comments online

# Exercise #1: The e-mail message

Hi everyone,

It is imperative that you review these requirements ASAP or we will miss the checkpoint next Monday. The latest spreadsheet which is attached below includes all of the requirements from sales, services, and customers that have crit-sits open with our support team but not from other customers. Edit the spreadsheet and include any additional customer requirements and send it back to me.

<XLS attached>

Thanks,  
VIP Executive

# Exercise #1: Editing, without formatting

It is imperative that you [Simplify: You must] review these requirements ASAP [Give specific date: by Friday, March 12] or we will miss the checkpoint next Tuesday. [Start new para] The latest spreadsheet which is attached below [Simplify: The attached spreadsheet] includes all of the requirements from sales, services, and customers that have crit-sits open with our support team but not from other customers [Again, simplify: requirements from sales, services, and customers engaged with support]. [Start new para] Edit the spreadsheet [Insert comma] and include any additional customer requirements [Insert comma] [what about providing comments on existing requirements too?] and send it back to me so that I can consolidate a final spreadsheet for the checkpoint meeting next Tuesday. [Remove repeated info about checkpoint mtg]

[If you agree with the above suggestions, here is the revised paragraph that you can copy and use:

You must review these requirements by Friday, March 12, or we will miss the checkpoint next Tuesday.

The attached spreadsheet includes requirements from sales, services, and customers engaged with support.

Edit the spreadsheet, include details for existing requirements, add other customer requirements that you are aware of, and send it back to me.

# Exercise #1: Editing, with formatting

~~It is imperative that you~~ [Simplify] You must review these requirements ~~ASAP~~ [provide specific date] by Friday, March 12, or we will miss the checkpoint next Tuesday.

[Start new para] ~~The latest spreadsheet which is attached below~~ [Simplify] attached spreadsheet includes all of the requirements from sales, services, and customers that have ~~crit sits~~ open with our support team but not from other customers [Simplify] requirements from sales, services, and customers engaged with support.

[Start new para] Edit the spreadsheet, and [Q: What about commenting on existing requirements?], include details for existing requirements, include any additional customer requirements that you are aware of, and send it back to me so that I can consolidate the requirements into a final spreadsheet. [Remove repeated info] ~~for the checkpoint meeting next Tuesday.~~

# Guidelines for editing online in plain text

- Use square brackets to insert comments
- Consistently place your markup & comments either within the text or below/after the text
- If fonts & formatting are available, consistently use strikethrough to delete existing text and consistently use color to show the new/updated text

# 5

Editing online in  
Microsoft Word

# Online editing features in Microsoft Word

- Revision-marking, for copy edits
  - Inserting & deleting text
  - Formatting text
- Inserting comments, for substantive edits
  - Using comment feature
  - Using square brackets and inserting text
- Accepting/rejecting comments, for writers & editors use
  - Reviewing markup/comments one at a time (how writers should use)
  - Accepting all (luckily, undo works!) (nice quality check for editors)
  - Removing all comments (nice cleanup feature for writers)

# Microsoft Word Options for track changes

The image shows the 'Options' dialog box in Microsoft Word, with the 'Track Changes' tab selected. The dialog box is titled 'Options' and has a question mark and a close button in the top right corner. The tabs at the top are: Asian Typography, File Locations, Japanese Find, Complex Scripts, View, General, Edit, Print, Save, Security, Spelling & Grammar, Track Changes (selected), User Information, and Compatibility.

**Track Changes options**

Insertions: Bold (dropdown) Color: By author (dropdown with red and blue icons)

Formatting: Color only (dropdown)

**Balloons**

Use balloons in Print and Web Layout

Preferred width: 2" (spinner) Measure in: Inches (dropdown)

Margin: Right (dropdown)

Show lines connecting to text

**Printing (with Balloons)**

Paper orientation: Preserve (dropdown)

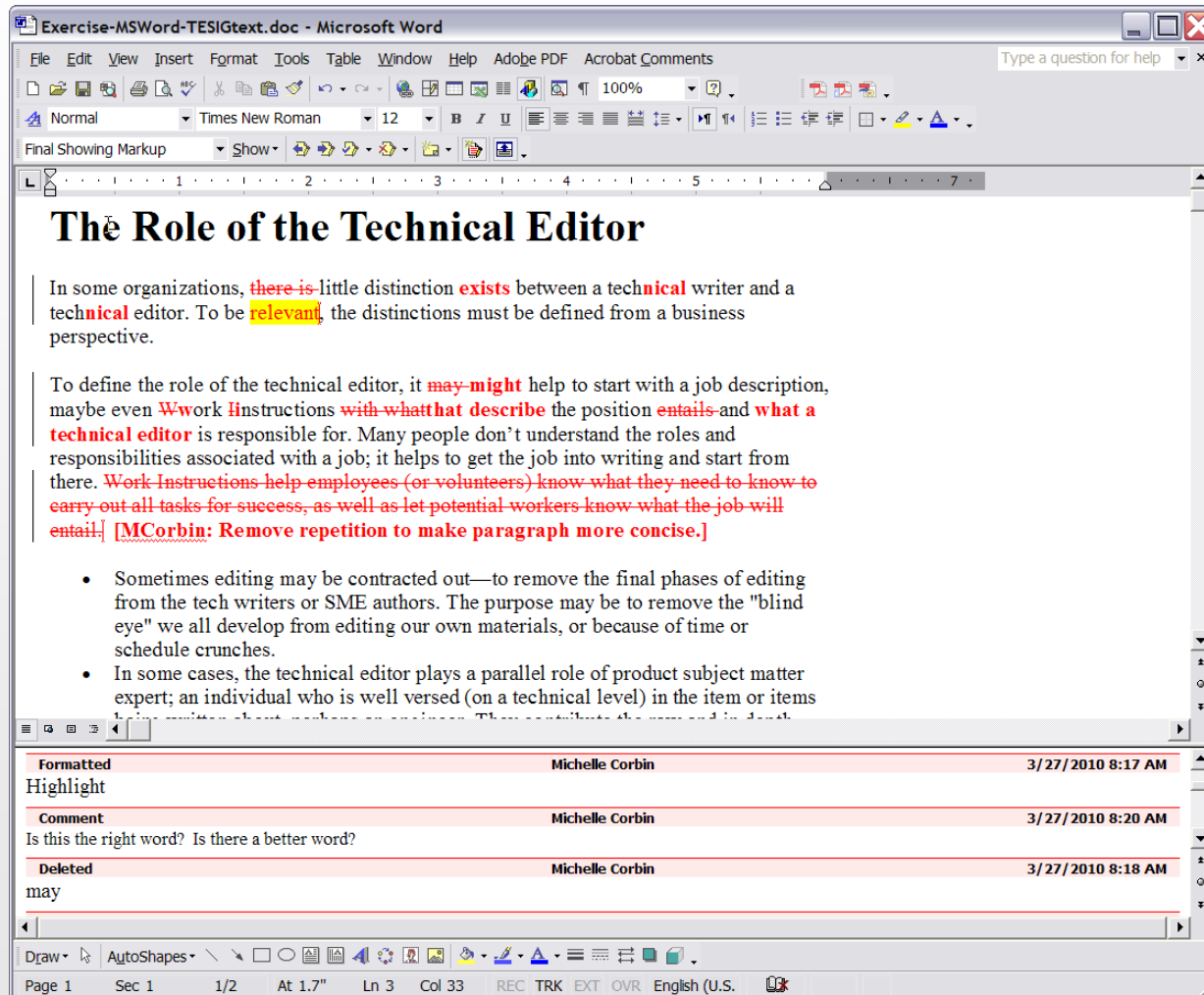
**Changed lines**

Mark: Outside border (dropdown) [Preview icons]

Color: Auto (dropdown)

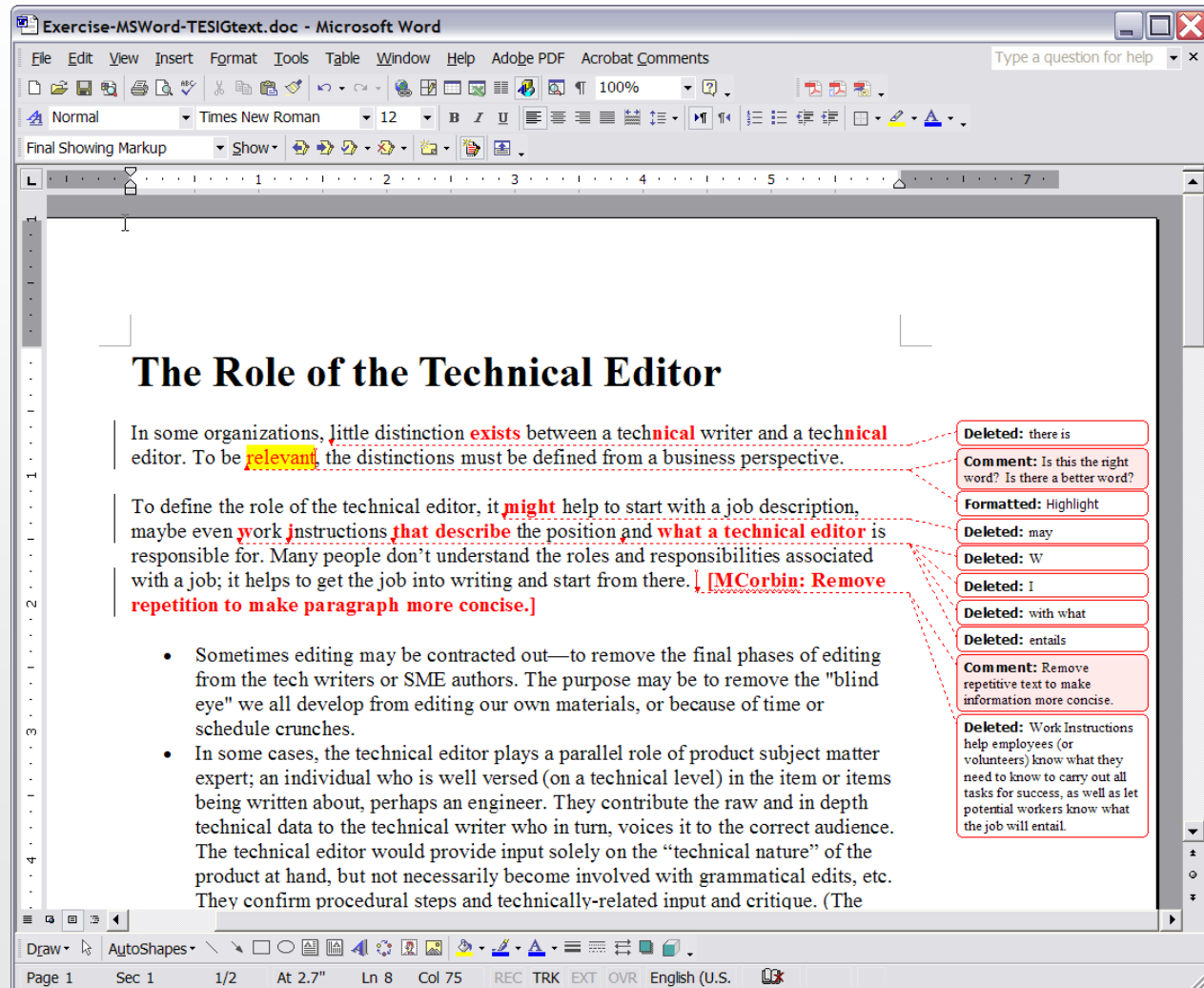
Buttons: OK, Cancel

# Microsoft Word - Track Changes – Normal View



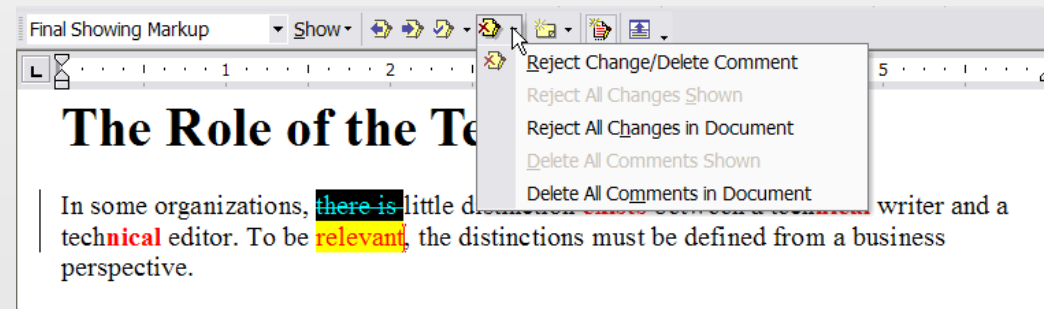
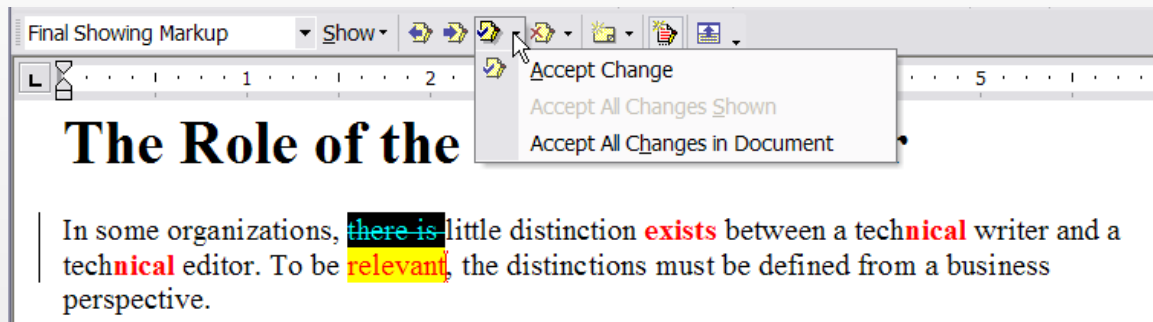
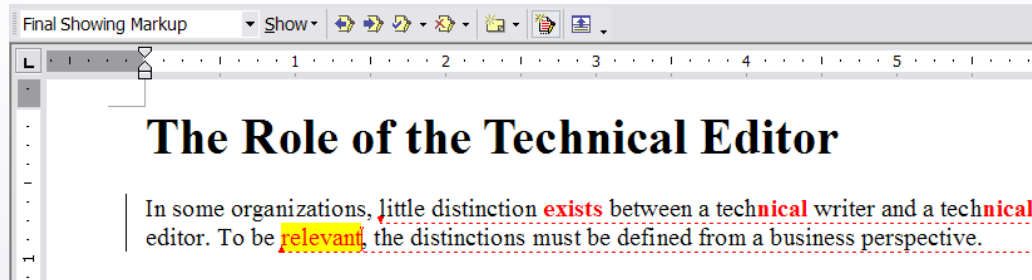
This text was used (with permission) from the STC Technical Editing SIG collaborative/wiki page: <http://www.stc-techedit.org/tiki-index.php?page=Understanding+the+Value+of+a+Technical+Editor>

# Microsoft Word - Track Changes – Print Layout View

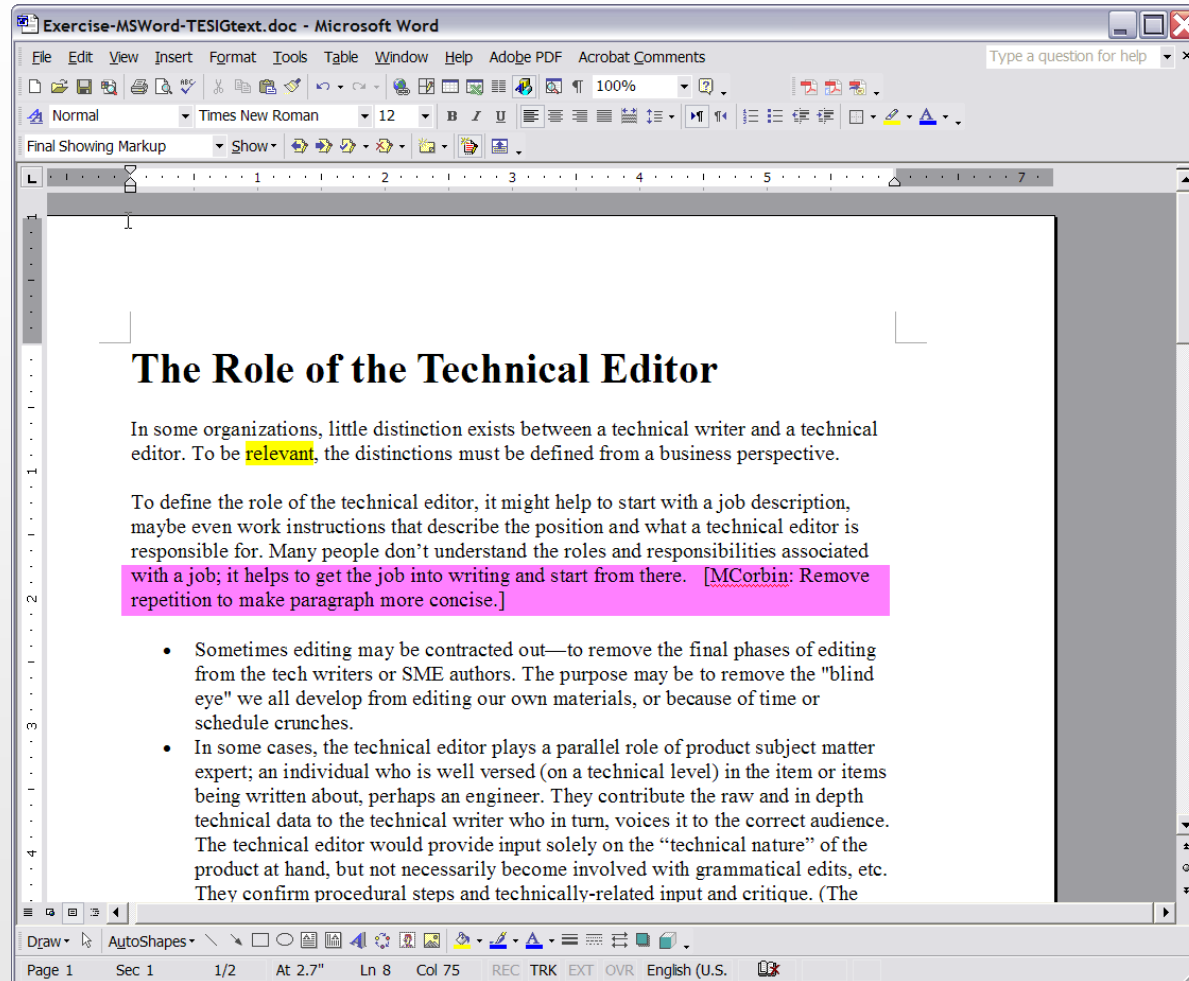


This text was used (with permission) from the STC Technical Editing SIG collaborative/wiki page: <http://www.stc-techedit.org/tiki-index.php?page=Understanding+the+Value+of+a+Technical+Editor>

# Accepting or rejecting comments & edits



# Updated file, after reconciling comments



# Guidelines for editing online in Microsoft Word

- Set colors & formatting for insertions & deletions for copy editing markup
- Use the comment feature (or note feature) to insert comments & queries (do not insert them in square brackets)
- Do not use the highlighting tool, as that changes the formatting of the actual text (it is not part of the revision marking features)
- As an editor, use the accept feature to review the modified/final text

# 6

Editing online in Adobe  
Acrobat

# Online editing in Adobe Acrobat

- Using the Comment & Markup and Text Edit tools
- Modifying attributes
- Setting comment preferences
- No matter what you do, process rules!

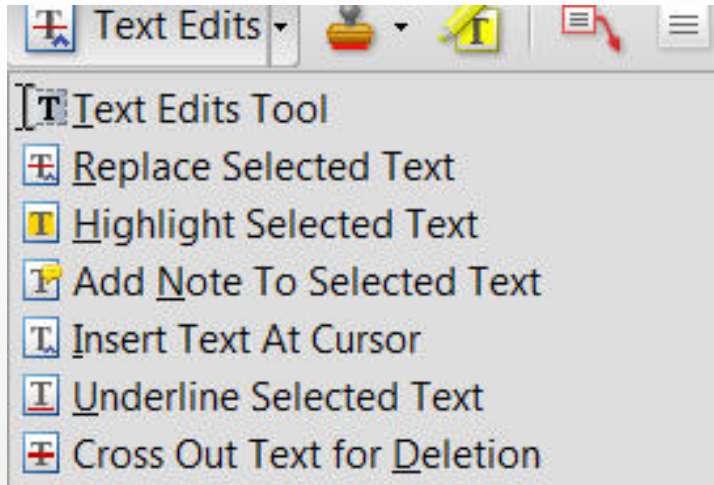
# Comment & Markup tool



## Substitute Acrobat tools for your blue pencil

- Sticky notes
- Text Edits tool (new in Acrobat 9)
- Stamp menu
- Text highlighter
- Callout tool
- Shape tools

# Text Edits tool



- New in Acrobat 9:
  - Textual markups
  - Text selection activates all tools
  - Insert, delete, replace as needed

# Results of using the Text Edits tools

The screenshot shows a text editor with the following text:

**Current View → Other → More → Title).**

- Point labels are available, but Font cannot be customized.

In Client 2008, point labels can be selected through the Chart View toolbar  
2008  
uses the default (system fonts) for chart labels.

- Color settings not available for chart

In the previous client, you can customize the color for the chart slice  
Color  
settings by right clicking on the chart as shown below. In Client 2008, the color  
for the  
chart slice cannot be customized.

Annotations and actions:

- Insert text:** An arrow points to the beginning of the first bullet point.
- Delete text:** An arrow points to the underlined text "as shown below".
- Replace text:** An arrow points to the underlined text "Font cannot be customized.", which is highlighted in a blue selection box.
- New text:** An arrow points to a blue-bordered text box on the right containing:  
**Replacement 4/2/2010 3:03:19 PM**  
oestric Options  
you cannot customize the font.

# Attributes

- The TouchUp Text tool allows you to change fonts, colors, and other attributes

## **Planning Checklist**

Planning is a key part of producing high quality deliverables. Use the checklist in [Table 1](#) to make sure you do it at the project level and per deliverable.

**Table 1** *Planning Checklist*

# Setting comment preferences

Viewing Comments

Font:  Font Size:

Pop-Up Opacity:

Enable text indicators and tooltips

Print notes and pop-ups

Show lines connecting comment markups to their pop-ups on mouse rollover

Ensure that pop-ups are visible as the document is scrolled

Pop-Up Open Behavior

Automatically open comment pop-ups for comments other than notes

Hide comment pop-ups when Comments List is open

Automatically open pop-ups on mouse rollover

Making Comments

Always use Log-in Name for Author name

Create new pop-ups aligned to the edge of the document

Copy encircled text into Drawing comment pop-ups

Copy selected text into Highlight, Cross-Out, and Underline comment pop-ups

# Using bubble comments

Planning is a key part of producing high-quality **final** deliverables. Use the checklist in **Table 1** to make sure your documentation project is **well-planned** at the project level and per deliverable.

**Comment on** 4/2/2010 3:49:57 PM  
oestreic **well-planned** Options ▾  
probably better to remove this word.

**Table 1** *Planning Checklist*

Plan Level	Task	Done
Project	Research customers and audiences to determine appropriate writing level and detail. See Human Factors, Technical Marketing, and Product Marketing engineers <del>as appropriate</del> to help you understand the customer needs.	
Project	Research product purpose and complexity	
Project	If the product is being updated, research change proposed, and purpose of changes	
Project	Get an estimate of the project timeline.	

**Cross-Out** 4/2/2010 3:51:59 PM  
oestreic Options ▾  
Review comma rules. None needed here.

# Guidelines for editing online in Adobe Acrobat

- Comments & Markup tool gives you power; don't overuse its abilities
- Text edit tool lets you provide guidance; use good judgment in color, emphasis, etc.
- Use bubble comments in place of margin comments—set preferences to serve needs
- Use attributes edits sparingly (maybe never) on others' work (fun to use on your own!)
- Always stick to process!



# 7

Exercise #2,  
Considerations and  
methodology

## Exercise 2: What would you do?

- Writer updates several topics and adds 2 topics to a help system two days before the final product build.
- Writer asks you to “edit” these topics. (There is a corporate mandate that all new/changed material must be edited.)
- Writer is in a different time zone and culture.
- What would you do? What type of edit? What tools? What process would you follow?



8

Discussion questions

## Discussion questions

- Is there a time when online editing is not appropriate?
- Does online editing take longer? For the editor? For the writer?
- If you have been doing online editing for awhile, have your editing skills changed, improved, degraded?
- Do you edit the source directly?



9

Resources

# Resources

- Hart, Geoff. Effective onscreen editing. <http://www.geoffhart.com/books/eoe/onscreen-book.htm>
- Baker, Donna L. Adobe Acrobat 9: How-Tos, 125 Essential Techniques. Adobe Press, 2009.
- Kelly, Will. "How to Use Adobe Acrobat for Online Document Reviews." <http://webworkerdaily.com/2009/09/03/how-to-use-adobe-acrobat-for-online-document-reviews/>
- Troffer, Alysson M. "Editing Online Documents: Strategies and Tips." Proceedings from the 49th Annual STC Conference.
- Crognale, Heather. "Long-distance editing: Tips for editors on managing the writer/editor relationship." Intercom, July/August 2008, pp. 17-19. [http://www.stc.org/intercom/PDFs/2008/20080708\\_17-19.pdf](http://www.stc.org/intercom/PDFs/2008/20080708_17-19.pdf)
- Oestreich, Linda. "Editing with heart" workshop presentation to 49th STC Annual Conference, May 2002
- Corbin, Michelle. "Effective Editing Comments" Webinar presented to TE SIG in 2009.
- Adobe Acrobat User Community. <http://www.acrobatusers.com/>

# Thank you!

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- Linda Oestreich  
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