Avoiding the copyeditor's queries, part 1: references

Four and a half things you can do to save the pain later

The steps are:

#1: Have all the citations got references? And have all the references got citations?

#1a: Extra wrinkle for short-title references.

#2: Got a bit more time? Check page numbers fit.

#3: Looking for some displacement activity? Check for glitches.

#4: Intrigued (and maybe shocked?) by what you've found so far and wanting to go further? It's time for detail.

References – two bonuses!

When I copyedit, around 70% of all queries are to do with the references. As there can be quite a wait between completing your manuscript and the copyeditor showing up, I know it's frustrating – and often difficult, if books have gone back to the library, or you're locked out of your office because of a pandemic, or you've buried that research under your current project – to have to try to resolve some of these queries.

I also know that your time is limited, so I'm going to take you through the biggest wins first and if you have more time, you can work your way down the list.

Because I copyedit humanities and social sciences books and journals, these tips will work for author-date (Harvard) or short title (notes and bibliography) referencing systems. I don't need to work with numbered systems like Vancouver so I have no specific wisdom for you there, but cast your eye down this list and see what strikes you as relevant.

First – ask yourself this question: do you have a references list, a bibliography or a select(ed) bibliography?

- A references list is a list of all the references cited in the text – and only those references.
- A bibliography has all the references cited in the text and some extra reading thrown in for good measure.
- A select bibliography (or selected bibliography, which is Chicago's preferred term) has the most important of the references that were cited in the notes. It can't work with author-date systems as otherwise your reader will see Smith and Jones (2019) and be left with no idea what you are referring to.

NB – I use Word on a PC and my instructions and screenshots reflect that. If you're on a Mac, try using the Command key instead of Control – I believe that will work in most cases.

#1: Have all the citations got references? And have all the references got citations?

This is absolutely essential for references lists and full bibliographies. Your copyeditor will be all over it.

So how do you check this? There are some attempts at commercial software to do this, but I've not found anything that's wholly satisfactory, and by the time you've finished dealing with the problems, you may as well have done it the manual way. But I can help speed it up, if you follow these steps. It's not a matter of reading through and seeing what you notice. It's going on the hunt!

WARNING!!!! Do NOT stop to read the text as you do this. Focus on the referencing alone.

1   Check your references list is in alphabetical order. For author-date, just select the references list text and click on the sort function in Word – you can find the button on the Home tab, in the Paragraph section.

This will work pretty well, but will fail if, say, the comma is missing after the surname, or there's an edited book mixed in with authored books. But don't worry about that – the sort function will be good enough for this purpose, and your copyeditor will do the fine tuning.

2   Now your list is in alphabetical order, print it out. Yes, on paper. Honestly, you'll thank me.

3   Move the cursor to the very start of your manuscript (if you have separate files for each chapter, you'll need to repeat these steps for each file).

4   Open up the Find box – either tick the Navigation Pane box on the View tab, or type Ctrl F, and make sure you're on the Results tab.
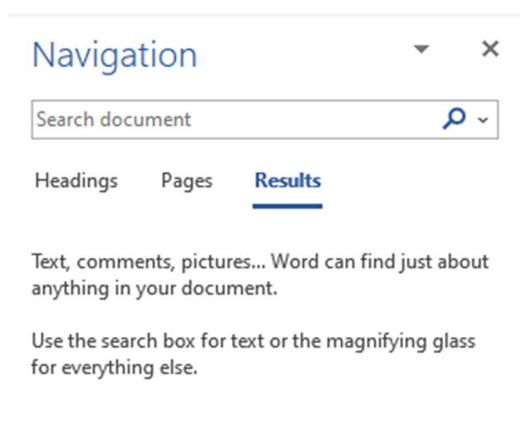

Alternatively, type Ctrl H which brings up the Find and Replace box, and choose the Find tab.
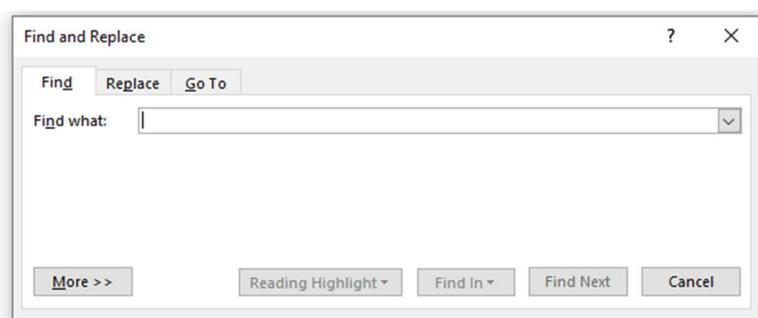
Drag this box off to the left, out of the way of the text.

5   Type this in the Find box or navigation pane: ^#^#^#^# and Word will search for any string of four digits. ^# is 'any digit', so you need ^# four times. Make sure there's no spaces, before or after.

Navigation

^#^#^#^#

Result 1 of 64

Headings   Pages   **Results**

2021

2020

2014
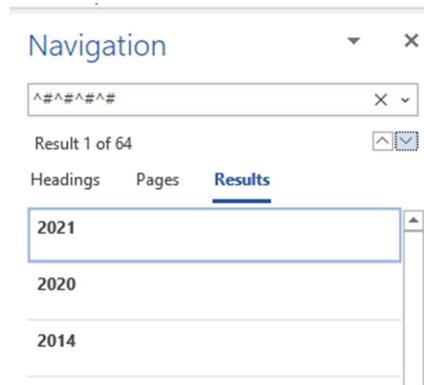
6   Click Next in the Find box or open the results in the navigation pane, and go to the first one. Now, if you've written a history, you're going to have a lot of false positives to click past, but it'll be fast. Believe me, I've done this a lot! If you're an author who has worked the date into the text, e.g. as Smith found in her 2005 seminal paper... then you'll have to be a bit more alert as you click past the strings of four digits.

7   When you reach the first citation, look up that reference in your printed-out list and tick it off. Repeat and repeat and repeat, taking care with authors with multiple references to tick the right one.

8   If you find a reference that's not in your references list, first look at the place where it should have been. Has a hard return been missed off and it's got sucked into the same paragraph as the neighbouring reference? Or is it, perhaps, if you're looking at the bottom of a page, in fact at the top of the next page? If not, it's missing and you'll need to insert it in the references list. Make a note of it for now, rather than break off and deal with it, and carry on searching the four-digit strings in your text. The easiest way to note it is to put highlighter on the names(s) and date.

9   Once you get to the end of your manuscript (by which I mean *all* the files for it – including any extra files for tables and artwork, which may have references to the sources) you may have a list of, or a collection of highlighted, missing references.

10   Look at your references list. Check each page and see whether every item is ticked as having been cited. Be alert for any of the missing references showing up as uncited references with the author names in a different order. Blooper or genuine difference? Also be alert for missing references showing up as uncited references with a different date. Again – blooper or genuine difference? If it's a blooper, make the correction.

11   Missing references first. Find them in your working materials, put them in the references list in the right spot and, if you've time, format them to match the rest. Your copyeditor will do it if you want to skip the styling.

12   Unused references. Do you want to add citations to the text and use some of them after all? Do you want to delete them? Do you want to keep them as additional reading? In this case, you'll not have a references list but a bibliography. Or perhaps you want to move the unused ones to a 'further reading' list? Does the publisher's style guide permit that? Check first.

13   Leave a note in the file telling the copyeditor what you were aiming for – references list, bibliography or select bibliography. They'll be delighted to find that message.

<div align="center">Congratulations!</div>

You've probably halved the queries your copyeditor would send you!

Even if you run out of time and don't get right to the end of the job, you're in a better position to deal with queries, and will have reduced your burden by a few.

#1a: Extra wrinkle for short-title references

One of my pet peeves on behalf of readers is not citing a work in full the first time it's used in each chapter. That's a lot of flicking backwards and forwards for your reader to figure out which reference you mean, if it's cited in Chapter 2 and not repeated until Chapter 7.

You can help everyone. Instead of just ticking the reference as you locate it in stage 1, add a note alongside the reference of the chapter number that it was cited in. Now – if it's the first time you've found it in that chapter, you know it should be in full. When you come across it in that chapter again, you know you should have the short title. Fix the manuscript if need be AND underline the words that you're using for the short title. Then you can use that consistently throughout.

#2: Got a bit more time? Check page numbers fit

If you're not quite so pressed for time, here's something to add as you go through stage 1. If the reference has a page number quoted, does it fit in the range you've given in the references list or bibliography? Failure to fit may mean:

1   there's a straightforward typo

2   you're using the e-version ahead of print for your page numbers, but have cited the print issue's page range in the reference

3   there's a clash of editions

4   you forgot to include the page range for a chapter or journal article.

Only you will know! Make your copyeditor love you and avoid pesky queries weeks, months, even years from now. In the later stages of the Covid-19 pandemic, I was editing books that had been ready for copyediting for two years. Cue authors trying to remember what on earth they were thinking back then.

#3: Looking for some displacement activity? Check for glitches

If you have multiple references by the same author, and you have time, take a closer look at them, and look for:

1   Duplications – quite often because the details are different – perhaps one has the full editor names and the other just initials (I see that a lot). Pick the one that suits the style you're using and delete the other.

2   Different editions of the same work – if the content is the same in both, pick one. But if material is quoted or discussed that doesn't appear in the other, keep both but be prepared to tell the copyeditor when they ask you – better yet, leave a note in your file for the copyeditor, to anticipate the problem and avoid sending the copyeditor down unnecessary rabbit holes.

Also be on the lookout when using cross-references within the references list: for some edited collections, some style guides say to give the book details in full once, and heavily abbreviated ones for each chapter you include in your references. Others say to give all the details in full for each chapter that's referenced. Check with the publisher's style guide

– which is applicable? When in doubt, include everything – most publications prefer this for the hyperlinking. You won't then need to include a reference just for the overall book.

#4: Intrigued (and maybe shocked?) by what you've found so far and wanting to go further? It's time for detail

Now we bring out your inner copyeditor. Doubtless you've worked to a particular style – APA, Chicago, Oxford, MLA, the publishing house style guide or something you've developed over the years for yourself. And maybe you use Endnote or another reference-herding software. Your copyeditor will find all the places you didn't quite stick to the style you thought you were using. I'm not going to fuss over commas and full stops here, but I'm thinking about:

- missing place of publication or name of publisher
- journal titles given in different forms (especially those journals that have different series).
- abbreviated journal titles. Most publishers I've worked with on humanities and social sciences books and journals ban abbreviated journal titles, yet I still spend quite a bit of time looking up the full title and changing the text. Check what's expected, from the publisher's style guide. You should be able to set any referencing software you use to output one or the other, correctly
- missing chapter title
- 'forthcoming' or 'in press' for something published five years ago
- a future date for something not actually published yet – use forthcoming. You have no idea if that book or article is going to be published when you think it is: delays are real
- broken links: has the website simply archived something and you can find the new link, or do you have to go to the Wayback Machine for a replacement? Or, indeed, revise your reference entirely if something is no longer available? If you're stuck with a broken link, delete the access date and say something like: formerly available at: https... I know the access date will show how old that reference is for you, but that leaves it up to the reader to waste time trying a link you know is dud and then hunting around the internet for the item

- page ranges using f. and ff. No publisher I work with uses those any longer – put in the precise page range.

Fix your manuscript *and* update any reference management system you use, so you can go forward with increased confidence.

Thank you, thank you, thank you

However much, or little, you have been able to put these steps into action, you have saved yourself queries (or are feeling very pleased with yourself!).

References – two bonuses!

If your sources are original documents in libraries and other repositories, all bets are off! This isn't the kind of thing your copyeditor can vet, but they should query any call number, or what have you, that looks out of whack (technical term). All I can say is take care and if you get the chance to double check them, perhaps by searching for strings of characters, take up the opportunity.

If your sources are newspapers and magazines, whether you're putting the details just in notes or in the references list or bibliography, do include as much information as possible to help a reader follow your footsteps – article title, author name if there is one, page number, full publication date… make a complete reference so your copyeditor isn't cataloguing query after query for you, long after you moved onto something else.