

## SISP Copyediting Guide

The Smithsonian Institution Scholarly Press (SISP) publishes works that report on the scientific research and humanities scholarship of Smithsonian museums and research units. These publications can be either scholarly books sold commercially or open access volumes published in an online portal called Open SI. SISP’s audience is an international one, professionals and students, and also the public. Its publications are expected to be key resources for future research.

While SISP expects a copyeditor (CE) to limit reworking text and to avoid rewriting or reorganizing content, CEs should aim to clarify text when necessary.

SISP’s style is based on the *Chicago Manual of Style*, long-standing scientific standards, and the international audience of Smithsonian research. For standard American spellings and hyphenation, SISP follows *Merriam Webster’s Collegiate Dictionary*.

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### SISP FORMATTING AND STYLE BASICS

If the manuscript you are copyediting is related to taxonomy or systematics, read “Editing for Science.”

For SISP's formatting and style preferences on these and similar topics, refer to the [SISP Manuscript Preparation Guide](#) (pp. 3–6):

- Text Formatting
- Punctuation
- Numbers
- Symbols
- Measurements
- Equations and Displayed Data
- Names of Taxa
- Material Examined

## STYLE SHEET

For any SISP project, a copyeditor (CE) should create – and add to while editing – a style sheet to submit with the completed copyedit. In some cases, the SISP editor will provide a starter style sheet, to which you should add, as appropriate. When submitted with the completed copyedited files, the project style sheet should include atypical style and formatting information for the SISP editor, such as:

- Nonstandard or discipline-specific terms or jargon that occur frequently in the manuscript;
- rare terms or phrases and their treatment as edited (e.g., spelling, capitalization), if it is unclear or could vary (e.g., *policy maker* as two words, native vs Native, U.S. vs US);
- Style decisions that conflict with Chicago's preferences (e.g., words as words in quotation marks instead of italicized);
- custom codes created to tag special elements in the text.

## QUERIES

Queries should be inserted as comments in the margins. Always remember that SISP's editors and/or authors must resolve each query then clean all files prior to typesetting. If there is an issue that occurs throughout a manuscript, the best practice is to either (1) request guidance from your SISP editor about how to edit as soon as you realize the issue is recurring, then mark the issue throughout instead of querying each time; or (2) mark each instance consistent with *Chicago Manual of Style* and inform the SISP editor of the style decision you made on your style sheet.

## TAGGING TEXT

Tags (or “typecodes”) are codes inserted around elements in a manuscript so typesetters know how to style/format those elements. Copyeditors must tag the appropriate elements with open and closing codes. Open codes are the codes surrounded by angle brackets; a closing code is the same mark but with a forward slash after the opening bracket (e.g., <au>John R. Smith</au>).

***Before tagging text, complete the items in the “Invisible’ Editing” section (p. 4 of this guide).***

Do **NOT** code the following elements:

- Regular text. Bold and other treatments will be retained by the typesetter without coding.
- Dashes. Key or insert en, em, and 3em dashes into the text.
- Superscripts and subscripts
- All-cap and cap/small-cap text in distribution listings or “Materials Examined” sections.

If a new code is needed to handle special styling, you may create a custom code using SISP's standard codes as a guide. Try to make it intuitive. List all custom codes on the project's style sheet with a description of the desired style or effect.

### *Running Head Codes*

<vrh> verso RH (series name)  
<rrh> recto RH (series vol. no.)

### *Most Common Codes*

<abs> abstract  
<abs head> abstract heading (on copyright pg)  
<au> monograph author(s) or volume editor(s) – use on title page  
<au fn> author footnote (bottom left of opening page of volume/paper includes affiliation(s) and submission and acceptance dates)  
<bl> bulleted list  
<ca> chapter/paper author(s) – for monograph, use on monograph opener (same page where author footnote will appear); for edited collection, use on chapter/paper openers  
<caption> caption text  
<ch> monograph title on monograph opener and for chapter/paper titles (use <sect> for frontmatter or backmatter section titles)  
<cn> chapter number  
<cst> chapter/paper subtitle (use only if instructed, otherwise include in chap. title)  
<ext> extract/block quote  
<fig1> Figure 1 (insert code where figure should be placed in page layout)  
<fl text> regular text flush left  
<nl> numbered list  
<notes> notes (open-code above first note, close-code after final note)  
<refs> references (open-code above first citation, close-code after final citation)  
<sect> frontmatter or backmatter section title (e.g., Contents, List of Figures, References)  
<st> monograph subtitle on title page (and on monograph opener, if there is room to accommodate it)  
<syn> synonymy  
<tab1> table 1 (insert code near where table should be placed in page layout)  
<tab fn> table footnote(s)  
<tab title> table number, title, and description  
<title> for volume title – use on title page only  
<ul> unnumbered list

### *Headings*

<a> A-head (centered, bold)  
<b> B-head (centered, cap/sc)  
<c> C-head (centered, italic)  
<d> D-head (centered, roman)  
<e> E-head (center, bold, c/sc)  
<f> F-head (center, bold, sent cap)

<g> G-head (indent, c/sc, period, em#, run-in w/para)  
<h> H-head (indent, ital, colon, em#, run-in w/para)  
<i> I-head (flush left, bold, sent cap)

### *Taxonomy Codes*

<fighead> list of figures that runs below an E- or F-head, taxonomic headings  
<key> taxonomic key  
<key a> heading of taxonomic key  
<key geo> geographic information in key  
<key nl> numbered entries in taxonomic key  
<key ul> unnumbered entry in taxonomic key (these run below numbered entries)

### *Less Common Codes*

<epi> epigraph  
<eq> equation (add number if equations are numbered in text)  
<ex> example (add number if examples are numbered in text)  
<frac> fraction  
<hang> text with hanging indent  
<note ext> extract in notes

## **START EDITING**

### **“Invisible” Editing**

A tracked document is difficult to read if minor, repetitive (often global), and/or required formatting-related edits are tracked. Some editing can be done “invisibly,” that is, without MS Word’s tracking feature turned on. We ask that you invisibly edit as many of the following standard editorial items as possible prior to tagging.

- Search for “/” and tag any numerical fractions in the text, captions, and tables.
- Use hyphen in spelled-out fractions (i.e., one-half, two-thirds, one-eighth).
- Replace double character spaces between sentences with single character space.
- Change common British spellings to American (e.g., recognise > recognize; behaviour > behavior; colour > color; theatre > theater)
- Changes to the table of contents to match chapter titles and headings in the main text.
- Change repetitive naturalized words from italic to roman (e.g., et al., in situ, a priori).
- Underlined text should be changed to italics as appropriate.
- Change time-related abbreviations (e.g., 10:00 AM, 9:35 PM [no periods] or 25 BCE)
- Use U.S. with periods as adjective / in name of federal entity (e.g., U.S. Navy). Spell out when referring to “United States” as a noun.
- In-paragraph numbered list, use “(1)”; numbered paragraphs, use “1.”
- Abbreviations “i.e.” and “e.g.” should be used only in parentheticals. If they need to be in running text, replace with “that is” and “for example,” respectively.
- Comma after “i.e.” and “e.g.” but not before “et al.”
- En dash (–) should be used for number and letter ranges (not a hyphen).

- For pauses in text indicated by dash, consistently use either em dash (—) with no spaces on either side or en dash (–) with spaces on either side. Usually the author will have established a preference; either is acceptable as long as consistent.
- In non-taxonomic manuscripts, allow italics for emphasis, but sparingly.
- In geographical coordinates, no space between coordinate value and compass directions E, S, N, W (e.g., 1°25.6'S, 77°43.8'W).

### Author Footnotes on Monograph Opener or Chapter/Paper Opener

To accommodate SISP's author footnote format, monographs require a "monograph opener" (similar to a chapter/paper opener) that includes the *volume* title and authors, the author footnote, and the beginning of the manuscript text. It will be page 1. As is standard for many journals, SISP will assign numbers, sequentially starting with 1, to each different author address.

- Addresses must be numbered in the order authors' names appear in the author line.
- A superscript numeral should be inserted next to each author's name in the author line based on what address is provided for that author.
- If multiple authors, each author name must carry at least one superscript numeral.
- If authors share the same address, their names will carry the same superscript numeral.
- If an author shows more than one address, that author's name will carry the number assigned to each of his addresses, separated by a comma and no space after comma.
- Serial comma used between authors' names must precede superscripts and be baseline.
- Use an asterisk in superscript to indicate corresponding author; it must follow all other superscripts next to the corresponding author's name. For example:

*<ca>Robert H. Cowie,<sup>1</sup> Kenneth A. Hayes,<sup>2,3\*</sup> and Ellen E. Strong<sup>3</sup></ca>*

- If all authors share the same address, the author footnote will not be numbered and no superscript should be used in the author line or in the author footnote except for the asterisk to indicate corresponding author. For example:

*<ca>Thomas W. Wilson and Kenneth A. Hayes\* </ca>*

- In the author footnote, each new numbered address should start on a new line.
- Each superscript – numeral or asterisk – should be followed by a character space before address text begins.
- The email of the corresponding author will be included, after "Correspondence:" and should not be followed by a period. No other email addresses should be included.

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*Manuscript received 11 March 2015; accepted 28 August 2015.*</au fn>

## Table of Contents

- Verify that all items listed on the TOC are included in the files sent by SISP.
- Mark for any apparent inconsistencies in styling, formatting, or punctuation.
- Unless otherwise noted by SISP, only A–B level subheads will be included on the TOC so edit accordingly. If you feel additional levels should be included, consult your SISP editor.
- Check the TOC against the manuscript. Verify that all chapter openers, headings, and subheadings (if applicable) match the text.
- Ensure frontmatter and backmatter (if applicable) are included.
- If there are differences, it is typically safe to change the TOC to match the main text files. Insert a margin query to the author to confirm the changes are acceptable.

## Acknowledgments

If there is an acknowledgments section, quickly read through to ensure professional titles and affiliations are provided uniformly and where appropriate.

## Headings

Verify all headings are styled consistently and so organization of the manuscript is clear to the reader. For details on how SISP wants authors to style headings, refer to the [SISP Manuscript Preparation Guide](#) (p. 2).

## Figures and Figure Captions

- Check spelling of all taxa names on an image or in a caption against text.
- Ensure information is not duplicated in figure and caption.
- All figures should be numbered sequentially with numerals (1, 2, 3) in the order they are called out in the text.
- For edited collections, double-digit numbering may be requested or necessary (1.1, 1.2, 2.1, 3.1). Consult with SISP editor if you require clarification on correct figure numbering.
- **REVISED Dec 2019:** In running text, SISP uses capitalized “Figure” to call out figures in the present work and lowercased “figure” for figures in other works. In parentheticals, SISP prefers “Figure” and “fig.”, respectively, but if used correctly and consistently, SISP may accept the capitalized abbreviation “Fig.” for figures in the present work.
- Plural “Figures” or “figures” only if >1 figure number is indicated (e.g., Figures 4, 5; Figure 7a–e; fig. 7c,j,k; figs. 7–10).
- For figures within text, add an “insert” code (e.g., <fig1> or <map5>) for each figure as it is called out, as close as possible after callout.
- For figures ganged at the end of the volume, place codes sequentially at end of main text (e.g., <figs. 70–100>).

- Ensure each figure has all its components (parts a, b, c, etc.) described in its caption and that all labeling matches (e.g., if uppercase letters are used for components in figure, uppercase letters should be used in caption).
- Ensure additional labeling on figure (e.g., abbreviations) is explained in the caption or reference is made to an in-text explanation.
- Figure caption structure: figure label; components in parentheses; explanation (if needed). If a figure has lettered components, the caption should begin with a cover term before the first component description [e.g., Figure 3. Wing venation: (a) species A; (b) species B.].
- Anatomical terms should generally be singular even though several may be illustrated.
- If applicable, figures should include a scale bar or scale description.

## Tables

- Tables should be numbered with numerals (1, 2, 3) in the order called out in the text.
- Become familiar with each table's structure and contents; data should be clearly presented.
- Comments that apply to the entire table may be included in the table title, in or out of parentheses, as appropriate.
- Comments that apply to particular parts of a table may be indicated as footnotes to that table, with superscripted lowercase letters (<sup>a</sup>, <sup>b</sup>, <sup>c</sup>) inserted at the highest hierarchical heading level to which they apply.
- Table number and title should appear above top rule of table. It should be coded <tab title>.
- All columns (including stub) must have a heading.
- Eliminate fully blank line spaces. If necessary to differentiate data sections within the table body, use a bold head centered across all columns in same font size as table body text. If the differentiation applies only to the stub column entries, indent the subordinate stub-column entries.
- Cells with no data should contain an em dash or "n/a," which should be defined in the table title. (However, a stub column cell should remain empty rather than repeat information identical to the stub cell(s) above it.)

## References

SISP accepts three reference systems (Author-Date, Notes & Bibliography, and Botany), depending on discipline convention. SISP guidelines to all three reference systems are available at [SISP's website](#). Each includes examples of common citations. Before beginning to edit a manuscript's references, consult the guideline that corresponds with the system to be used in the manuscript, which should be provided to you by SISP's production editor.

# EDITING FOR SCIENCE

## Scientific Terminology

Below are some terms copyeditors should review before editing scientific text. These definitions (e.g., treatment of authority in species names) apply primarily to zoological papers; style variations for botanical papers will be provided per project, if necessary.

**authority** (author or authors): person or persons to whom a work, scientific name, or nomenclatural act is attributed; usually also the person or persons who first described.  
Example: *Phaseolus helvolus* (L.) or *Strophostyles helvola* (L.) Elliott. [\*Note: Linnaeus described the former, Elliott placed the species into a new genus, *Strophostyles*, which he had described.]

**Linnaeus (L.):** “the father of taxonomy”; eighteenth-century scientist who is authority for many of the oldest zoological and botanical species; as authority, almost always shown as “L.”.

**phylogeny:** evolutionary history of an organism or group of organisms.

**synonym:** each of two or more names of the same hierarchical rank given to a single taxon.

**synonymy:** relationships of the synonyms for a given organism.

**systematics:** the study of biological diversity and of the evolutionary relationships among organisms (phylogeny).

**taxon:** (pl. taxa): a taxonomic unit, named or not, representing one or a group of organisms.

**taxonomy:** the identification, classification, and nomenclature of things, especially of organisms.

For more detail on definitions for systematics and taxonomic terminology, we recommend the following references:

- 1) *Describing Species* by Judith E. Winston (Columbia University Press, 1999)
- 2) International Code of Zoological Nomenclature, 4th edition. International Trust for Zoological Nomenclature, 1999. Available at <http://www.iczn.org/iczn/index.jsp>.
- 3) International Code of Botanical Nomenclature (Saint Louis Code). International Association for Plant Taxonomy, 2000. Available at <http://www.bgbm.org/iapt/nomenclature/code/SaintLouis/0000St.Luistitle.htm>.

## Names of Taxa

- Names of taxa should not be abbreviated in heads (especially not new taxa) or at the beginning of sentences.
- Genus should be included at first mention of a species, unless all species being discussed belong to the same genus.
- New taxa descriptions: In “Etymology” sections of the manuscript, Latin names should be italicized followed by the English meaning in parentheses.
- In zoology papers, do not abbreviate the author of a taxon except for Linnaeus (L.).
- Suprageneric taxa should appear in CAP/SMALL CAP, unless in a phrase or sentence.
- Authority of a species: Ask for the authority in taxonomic works or when the author identifies a specimen as being a specific species. Do not ask for the authority when the author is merely stating the names of species mentioned by another person or in another work (i.e., when someone else has determined the identity).
- Question mark in a taxon:  
*Obelia? geniculata* = correctness of generic name is in doubt  
*Obelia geniculata?* = correctness of specific name is in doubt  
*?Obelia geniculata* = correctness of entire citation is in doubt

## Synonymy

- Synonymy entries follow either an E- or F-head that lists the taxon (e.g., genus); see example below.
- Original describer should never be separated from taxon.

- Subsequent authors, incorrect spellings, etc. should be separated from taxon with a period, em dash: “.—”
- In annotations, what follows an equals sign should be the correct form.
- Semicolons should be used to separate data within each subsequent author’s description.
- Not applicable to new taxa.

Example for various disciplines (excluding type codes):

**Genus *Nostima* Coquillet**

*Nostima* Coquillet, 1900a:35 [type species: *Nostima slossonae*, by original designation; as a genus].—Cresson, 1930a:101 [*Nostima* compared with *Philygriola*]; 1931:89 [key to genera]; 1944:176–177 [key to Nearctic species].—Sturtevant and Wheeler, 1954:239–242 [review of Nearctic species].

*Philygriola* Hendel, 1917:42 (type species: *Notiphila picta* Fallén 1813:254, by original designation); 1930:141 [compared with *Hydrellia*].—Cresson, 1930a:101 [synonymy].

Example for Botany specifically, with slight style difference (including type codes):

<syn>***Aylacophora deserticola*** Cabrera, Bol. Soc. Argent. Bot. 4(4): 268, 1953. *Nardophyllum deserticola* (Cabrera) G. L. Nesom, Phytologia 75(5): 362, 1993. TYPE: “Argentina, Neuquén, Plaza Huincul, 4-XII-1952, *Cabrera 11053*” (holotype: LP 562212-A!; isotypes: GH, LP 562212-B!, LP 562212-C!, US!).</syn>

[Note: The “!” indicates the author has seen and studied the indicated type specimen.]

<syn>***Cabreraea*** Bonif. **gen. nov.** TYPE: *Chiliophyllum andinum* Cabrera, Notas Mus. La Plata, Bot. 19(92): 193, 1959 (≡***Cabreraea andina*** (Cabrera) Bonif. **comb. nov.**). </syn>

[Note: Triple equal sign (≡) refers to a HOMOTYPIC synonym; a regular equal sign (=) would denote a HETEROTYPIC synonym.]

**Taxonomic Keys**

- Keys are typically formatted either with aligned couplets or indented couplets. Both are acceptable, but the same style should be used throughout a manuscript.
- Key must be fully justified with right-aligned tabs for the ending right-side elements (taxon or number).
- Keyed out taxa names are in boldface (but just the names themselves).
- If author has used a line of periods in a key, replace with a dot leader tab; ensure there is a space both before and after the dot leader tab.
- If a keyed-out taxon or number is not separated from its description by at least 3 dots, move it to the next line preceded by dot leaders and a space.
- Indent line overruns in couplets of an aligned-couplet key.
- References to main-text figures and tables in taxonomic keys should go in brackets.

- Descriptive or explanatory comments (e.g., non-dichotomous, non-diagnostic) should go in parentheses.
- Descriptive geographical information may go in parentheses on the next line, flush to the right margin.
- Carefully check alignment of all couplets, especially for indented keys.
- Contact your SISP editor if you have questions

Example of aligned-couplet key excluding type codes:

**Key to the Genera of Arrhenophanidae**

1. Forewing with all five branches of radial vein reaching margin [Figures 32, 33] ..... 2  
     Forewing with only four branches of radial vein reaching margin; R4 and R5 completely fused ..... 3
2. Forewing with R2 and R3 stalked [Figure 33] ..... **Cnissostages**  
     Forewing with R3 and R4 stalked [Figure 32] ... **Notiophanes**, new genus
3. Hindwing with vein 1A only slightly sinuate at middle; M usually divided within cell; accessory cell present in forewing [Figures 29, 30] .....  
     ..... **Palaeophanes**, new genus  
     Hindwing with 1A only slightly curved; M not divided within cell; accessory cell absent in forewing [Figures 34, 35] ..... 4
4. Forewing with vein R3 and usually R4 + R5 terminating on costa before apex [Figures 34, 35]. Female antenna serrate ..... **Dysoptus**  
     Forewing R3 and R4 + R5 terminating on termen below apex [Figure 37]. Female antenna strongly bipectinate ..... **Arrhenophanes**

Example of aligned-couplet key including type codes:

<key a>**Key to the Genera of Arrhenophanidae**</key a>

<key>

- <key nl>1. Forewing with all five branches of radial vein reaching margin [Figures 32, 33] ..... 2  
     Forewing with only four branches of radial vein reaching margin; R4 and R5 completely fused ..... 3
2. Forewing with R2 and R3 stalked [Figure 33] ..... **Cnissostages**  
     Forewing with R3 and R4 stalked [Figure 32] ... **Notiophanes**, new genus
3. Hindwing with vein 1A only slightly sinuate at middle; M usually divided within cell; accessory cell present in forewing [Figures 29, 30] .....  
     ..... **Palaeophanes**, new genus  
     Hindwing with 1A only slightly curved; M not divided within cell; accessory cell absent in forewing [Figures 34, 35] ..... 4
4. Forewing with vein R3 and usually R4 + R5 terminating on costa before apex [Figures 34, 35]. Female antenna serrate ..... **Dysoptus**  
     Forewing R3 and R4 + R5 terminating on termen below apex [Figure 37]. Female antenna strongly bipectinate ..... **Arrhenophanes**</key nl>

</key>

Example of an indented-couplet key including type codes:

- <key a>**Key to the Species of *Carex***</key a>
- <key>
- 1a. Style 2-branched; achene biconvex ..... 2
    - 2a. Spikes 3–4.5 mm wide; perigynia narrowly ovate or lanceolate, rib-margined .....  
..... ***C. bonplandii***
    - 2b. Spikes 4–6 mm wide; perigynia broadly obovate or suborbicular, wing-margined .....  
..... ***C. longii***
  - 1b. Style 3-branched; achene trigonous ..... 3
    - 3a. Inflorescence open with nodding spikes; spikes (3–)3.5–8(–10) cm long; achene constricted abaxially ..... ***C. jamesonii***
    - 3b. Inflorescence contracted, with erect to spreading spikes; spikes 0.5–2.5(–3) cm long; achene not constricted ..... 4
      - 4a. Terminal spike androgynous; pistillate spikes 2–3 mm wide; perigynia 3.5–4 × 1–1.2 mm ..... ***C. tachirensis***
      - 4b. Terminal spike wholly staminate; pistillate spikes 5–9 mm wide; perigynia 3.7–6 × 1.3–1.7 mm ..... ***C. tamana***
- </key>