How to Check Consistency and Enforce Your House Style: Using PerfectIt in Regulatory Submissions and Publications
OVERVIEW

- Part 1 (Consistency)
  - Why are we here?
  - What is PerfectIt?
  - What errors does it find?
  - Why use it?
  - Demo
- Part 2 (Enforcing house styles)
- Pricing
- Questions
Why Do You Write/Edit?
WHAT IS YOUR (ACTUAL) JOB?

- Make sense of:
  - Complexity
  - Multiple authors
  - Poor writing
- Make the best impression
- Focus readers on the science
- Manage stakeholders
- High stakes with time/budget pressure
- Who has the time to focus on tiny mechanical errors?
WHAT IS PERFECTIT?

- Add-in for MS Word
- Checks consistency
- Enforce house styles
- Launched in 2009
WHAT DOES PERFECTIT DO?

- Consistency
  - Hyphenation (broad based / broad-based)
  - Numbers (numerals / words)
  - Spelling (advisor / adviser)
  - Capitalization (University / university)
  - Header capitalisation
  - Lists (punctuation and capitals)

- Style / Corrections
  - Abbreviations
  - Common typos
  - Brackets and quotes left open
  - Comments left in text
DOCUMENT TYPES

- Long documents
- Speed
  - AMCP Dossiers
  - Regulatory Submissions
  - Study Reports
  - Publications/Journals
  - Evaluation Reports
  - Grant Applications
  - Package Inserts
STRENGTHS AND WEAKNESSES

- Strengths
  - Long documents
  - Speed
  - Customizable for house styles

- Weaknesses
  - Sections of documents, e.g. AMA rules for tables, abstracts
  - False assurance
  - False positives

Do not abbreviate “diabetes” or “diabetes mellitus” (DM), or “insulin analogues” (IA), or “oral antidiabetes drugs (OAD)” (unless they appear in a table or figure and are explained in a legend beneath); write out the terms wherever they appear in text.

NOTE: Diabetes and diabetes mellitus are interchangeable.

While it is acceptable to abbreviate certain Latin terms (e.g., i.e., et al.) in CADTH documents, do not abbreviate “versus” (vs.) unless it appears in a table and is included in the legend underneath.
The name of the current check is shown here
If there is a choice of preferred form, the options are shown here
The location list shows all places where that error may appear
PART 2: ENFORCING HOUSE STYLES

- Objectives
- What Are House Styles?
- Built-in Styles
- Creating Styles
- Settings
- Find and Replace
- User Notes
- Sharing Styles
- Pricing
OBJECTIVES

- Goal is to make you comfortable with PerfectIt’s Style Sheet Editor
- And that’s all!
- No need to write. Slides available: https://intelligentediting.com/amwa2019
- Comprehensive video tutorials at: https://intelligentediting.com/videotutorials
VERSIONS

- PerfectIt 4
  - PC Only
  - Released June 2019
  - Customizable
- PerfectIt Cloud
  - Mac-compatible
  - Install direct from the Office Store
- All purchases since June 2018 include both versions.
WHAT ARE HOUSE STYLES?

- PerfectIt can check
  - Spelling
  - Hyphenation

- PerfectIt cannot check
  - Grammar
  - References

- PerfectIt can sometimes check
  - Numbers
  - Bullets
  - Personal titles
  - Capitalization
BUILT-IN STYLE SHEETS

- Style sheets available in PerfectIt:
  - UK, US, Canadian, and Australian Spelling
  - EU, UN, WHO, GPO
  - Australian Government Style
  - American Legal Style
- Select from the dropdown
HOW TO CREATE A STYLE SHEET

- Open Word
- Click the PerfectIt Ribbon
- Click ‘Manage Styles’
- Click ‘New’
- Decide what to base it on
- Give the style sheet a name
- Select your style, click ‘Edit Current Style’
- The tool for editing style sheets
HOW TO EDIT SETTINGS

- Open the Style Sheet Editor
- Click the ‘Settings’ tab
- Scroll to ‘Spelling Variations’
- Click on ‘Ise’ and ‘Ize’ Endings
- Choose ‘Prefer Z’
- Click ‘Apply’
Open the Style Sheet Editor
Click the ‘Always Find’ tab
Choose ‘Spelling Variations’
Always find: type ‘adviser’
Suggest: type ‘advisor’
Click ‘Add’
One find/replace match per line
HOW TO ADD A USER NOTE

- Click the ‘Always Find’ tab
- Click in the ‘Style Notes’ column
- Enter the note you want to appear
SHARING STYLE SHEETS

Instructions
Use the options below to manage style sheets and set preferences for checks.

Manage Style Sheets
Current style sheet: United Nations Style
- Import
- Export
- Combine
- Delete
- New

Style Sheet Settings
Settings: Edit Style Sheet
Sections to check: Choose Sections

Advanced
Style Cache: Clear Style Cache

OK
Help
Pricing (USD, excluding VAT)

- Licenses
  - 1 User: $70 per year
  - 20 Users: $1127 per year
  - 100 Users: $2495 per year

- Discount for AMWA Members
  - 30% Discount on a single license ($49 per year)
  - Link in the member area of the AMWA website.
This might be awkward...
QUESTIONS

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