



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*.

STYLE SHEET	2
QUERIES	2
TAGGING TEXT.....	2
Running Head Codes	
Most Common Codes	
Headings	
Taxonomy Codes	
Less Common Codes	
START EDITING	4
Table of Contents	
Acknowledgments	
Headings	
“Invisible” Editing	
Figures and Figure Captions	
Tables	
References	
SISP Formatting and Style Basics	
EDITING FOR SCIENCE	7
Scientific Terminology	
Names of Taxa	
Synonymy	
Taxonomic Keys	

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, which should include atypical style and formatting information for the SISP editor, such as:

- frequently used terms, usually discipline specific;

- 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>).

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
	unnumbered list

Headings

<a>	A-head (centered, bold)
	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)
<hang>	text with hanging indent
<note ext>	extract in notes
<pn>	part number
<pt>	part title

<pa> part author

START EDITING

Author Footnotes and the Monograph Opener or Chapter/Paper Openers

To accommodate SISP's author footnote format, monographs will 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 in which 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.
- 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.
- When an author requires more than one superscript, the numbers must be separated by commas with no spaces after commas.
- Serial comma used between authors' names must precede superscripts and should be baseline.
- An asterisk superscript should be used to indicate corresponding author, and it must follow all other superscripts.
- If all authors share the same address, no superscript should be used in the author line or in the author footnote except for the asterisk to indicate corresponding author.

<ca>Robert H. Cowie,¹ Kenneth A. Hayes,^{2,3*} and Ellen E. Strong³</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.
- No email addresses should be included in numbered addresses in the author footnote. Only the email of the corresponding author will be included, after "Correspondence:" and should not be followed by a period.

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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–C 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 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).

“Invisible” Editing

Some editing can be done “invisibly,” that is, without MS Word’s tracking feature turned on. A tracked document is difficult to read, especially for authors during their review of the edits, if minor, repetitive (often global), and/or required formatting-related edits are tracked, so we recommend you invisibly edit the following standard editorial items.

- Replace double character spaces between sentences with single character space.
- Change common British spellings to American (e.g., towards > toward; recognise > recognize)
- 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).
- Allow italics for emphasis, but sparingly.
- Underlined text should be changed to italics as appropriate.
- Change time-related abbreviations (e.g., 10:00 AM, 9:35 PM [no periods] or 25BCE)
- Use U.S. with periods as adjective / in name of federal entity (e.g., U.S. Navy).
- In-paragraph numbered list, use “(1)”; numbered paragraphs, use “1.”
- Abbreviations “i.e.” and “e.g.” should be used only in parentheticals.
- 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.
- Use hyphen in spelled-out fractions (i.e., two-thirds, one-eighth).

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.
- “Figure” when calling out figures in present work; “figure” for those in another 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 sequence in which they are called out in the text.
- Look at each table’s structure and become familiar with the 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 (a, b, c) 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

Dependent upon subject matter, SISP accepts three reference systems: Author–Date, Notes & Bibliography, and Botany. Guidelines – with examples of the most common types of citations – are provided for each system on the “Resources” tab on [SISP’s website](#). Before beginning editing on a

manuscript's references, consult the guideline that corresponds with the system being used in the manuscript.

SISP Formatting and Style Basics

If the manuscript you are copyediting is related to taxonomy or systematics, read the next section, "Editing for Science."

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

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

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 (\equiv ***Cabreraea andina*** (Cabrera) Bonif. **comb. nov.**). </syn>

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

Taxonomic Keys

- 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 right.
- 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. Contact your SISPEditor if you have questions.

Example 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 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>