

# Quick Guide #1: Editorial Review

Here are 10 steps to guide you through the editorial process. Please note that most CTPS work products are prepared in Microsoft Word templates and must remain in Word throughout the editorial process. Edited versions of your document should not be opened in a browser using GoogleDocs as doing so will change the underlying formatting of the file. If you initially created your document using GoogleDocs, refer to *Quick Guide #2* for instructions on how to convert your files to Microsoft Word.

**Step 1:** Review the resources on the Intranet.

- The [Editorial Style Guide](#) gives an overview of the editorial process.
- The [Document Production Guidebook](#) outlines the mechanics of document production.
- [Templates](#) are available for all work products. Templates are Microsoft Word files that contain pre-set text styles (for report, chapter, figure, and table titles; headers and subheaders; and citations) and essential components (such as table of contents, cover pages, and the MPO's nondiscrimination statement).
- The [file-naming convention](#) ensures version control when documents are shared.

**Step 2:** Download the appropriate template, using Microsoft Word, and rename it following the file-naming convention. Your first draft will have a file name ending with the number "1."

*For example:*

*2022-01-19-Template-Tech-Memo → rename →  
2023-07-14 Your Memo Title MEM AA 1*

**Step 3:** In the template, fill in your text within the bracketed sections without altering the boilerplate text (i.e., the fixed titles and headers and nondiscrimination statement that are in all like documents).

**Step 4:** When your manager and any other CTPS reviewers approve the first draft of the document, email the document to [editorial@ctps.org](mailto:editorial@ctps.org). In your email, you may let the editors know your requested deadlines:

- First edit—When would you like Editorial complete the initial review of the document?
- Client review draft—When do you need a finished version of your document to send to MassDOT, the MBTA, or a municipal client to get feedback? Keep in mind that there may be multiple editing reviews before the document goes to the client review draft stage.
- Final version—When must the final version of the document, incorporating clients' feedback, be delivered? The deadline could be the date the document

must be posted online for an MPO board meeting or the date the document will be delivered to the client.

You will receive an email in reply from the editor assigned to your project.

**Step 5:** The editor will use Microsoft Word's *track changes* feature to edit and may insert comments with questions or suggestions. A redlined version will be returned to you. For version control, the returned file will have been renamed by the editor to end in "1a."

*2023-07-14 Your Memo Title MEM AA 1a*

**Step 6:** You can accept edits by using *track changes* or reject edits by leaving a comment to the editor indicating why the edit is unacceptable. Return your second version to the editor.

*2023-07-14 Your Memo Title MEM AA 2*

**Step 7:** The editor addresses your comments and reads through the document a second time. The editor will return another redlined version if there are more edits.

*2023-07-14 Your Memo Title MEM AA 2a*

Following versions, if necessary, continue with this numbering pattern of files ending in 3, 3a, 4, 4a, etc. If there are no other edits, the editor will return a client review draft.

*2023-07-14 Your Memo Title MEM AA 2a\_Client Review Draft*

**Step 8:** If you are writing a work program or work scope, complete the exhibits in the Exhibit Builder and send PDFs to the editor.

**Step 9:** Send the client review draft to outside reviewers if necessary. If the reviewers have edits, add their changes to the document using *track changes* and return the document to the editor. Any other changes that you make should also be added in *track changes*.

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**Step 10:** The editor will do a final check and return a final copy with the watermark removed.

*2023-07-14 Your Memo Title MEM AA FINAL*

This version can be sent to Graphics for formatting and preparation for web posting and public release.