
How to Check Consistency and Enforce Your House Style: Using PerfectIt for Faster and Better Results



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CEO and Founder

DANIEL HEUMAN

- Founder and CEO of PerfectIt
- Developed original version of PerfectIt
- Spoken at SENSE, CIEP, ACES, EFA, AMWA, EMWA, NWEA, BAEF, and others.



PART I: OVERVIEW

- Why are we here?
- What is PerfectIt?
- What errors does it find?
- Why use it?
- Demo



A woman with dark hair is sitting at a desk, focused on writing in a notebook with a blue pen. A laptop is open to her right. The background is a blurred office or library setting. A blue horizontal bar is at the top of the image, containing the text 'WHY ARE WE HERE?'.

WHY ARE WE HERE?

WHY DO YOU WRITE/EDIT?

WHAT IS YOUR (ACTUAL) JOB?

- Make sense of:
 - Complexity
 - Multiple authors
 - Poor writing
- Make the best impression with words
- Focus readers on the story and meaning
- Eliminate errors
- Manage your author and stakeholders
- All under time/budget pressure (or both)
- Run a business!

WHAT IS PERFECTIT?



Add-in for MS
Word



Launched
in 2009



Checks
consistency



Enforces
house styles

POLL

Have you used PerfectIt before?

WHAT DOES PERFECTIT DO?

Consistency

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

Style/Corrections

- Abbreviations
- Common typos
- Brackets and quotes left open
- Comments left in text

WHY USE PERFECTIT?

- Consistency mistakes are difficult to find
- Spotting consistency mistakes is time-consuming. It's better to spend that on translation quality.
- Write your way – no templates, forms or markers
- Existing checking software:
 - Can't find consistency mistakes
 - Isn't built for professionals
- Finds consistency errors in seconds

VERSIONS

- PerfectIt 4
 - Windows edition
 - Released June 2019
 - Customizable
- PerfectIt Cloud
 - Mac-compatible
 - Install direct from the Office Store
- All purchases since May 2018 include both versions.

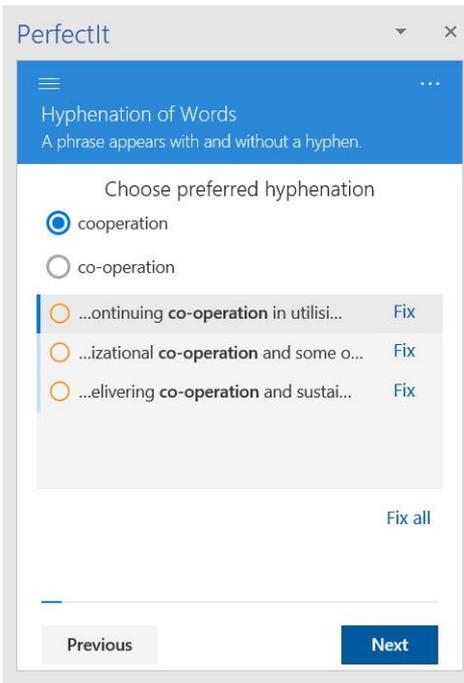
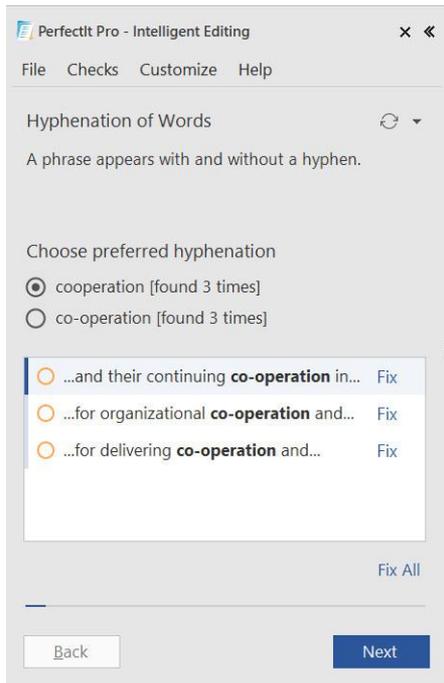
WHO USES PERFECTIT?

- Over 8000 licenses in 72 countries
- Professional editors, proposal writers, medical writers, translators, lawyers, and technical writers
 - Thousands of editors (over 500 members of CIEP)
 - Medical writers voted PerfectIt as their third most essential tool*
 - Working with ASTC since 2010
- Major Companies
 - UnitedHealthcare
 - Cessna Aircraft
 - Johnson & Johnson
- Government and Transnational Institutions
 - USA (CDC, LoC, NASA), Canada (DND, HC, CADTH)
 - Australia (DIIS, DoD), UK (MAIB, NICE), South Africa (DPME), New Zealand (ComCom, MBIE)
 - European Union (ECB, DGT, EMCDDA, Council of Europe)
 - United Nations (IARC, WHO, ILO, IFAD, UNFCCC, WTO, STL, UNRISD)
 - Other (IAEA, OECD, IEA, NEA)



* Source: Nicosia M. Results from the 2016 Freelance Medical Communicator Tools of the Trade Survey. AMWA Journal. 2017;32(3):105-112.)

CHOOSE YOUR VERSION

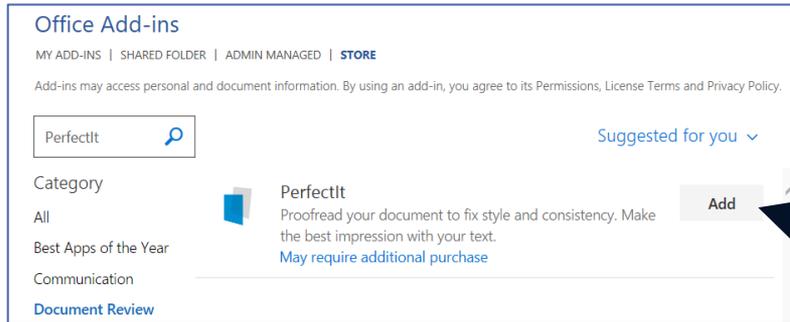
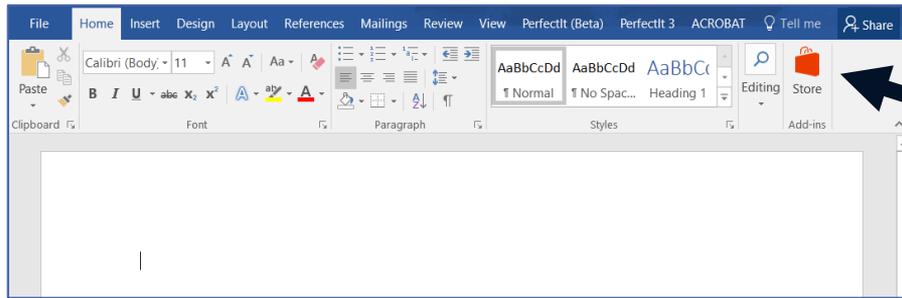


VERSIONS

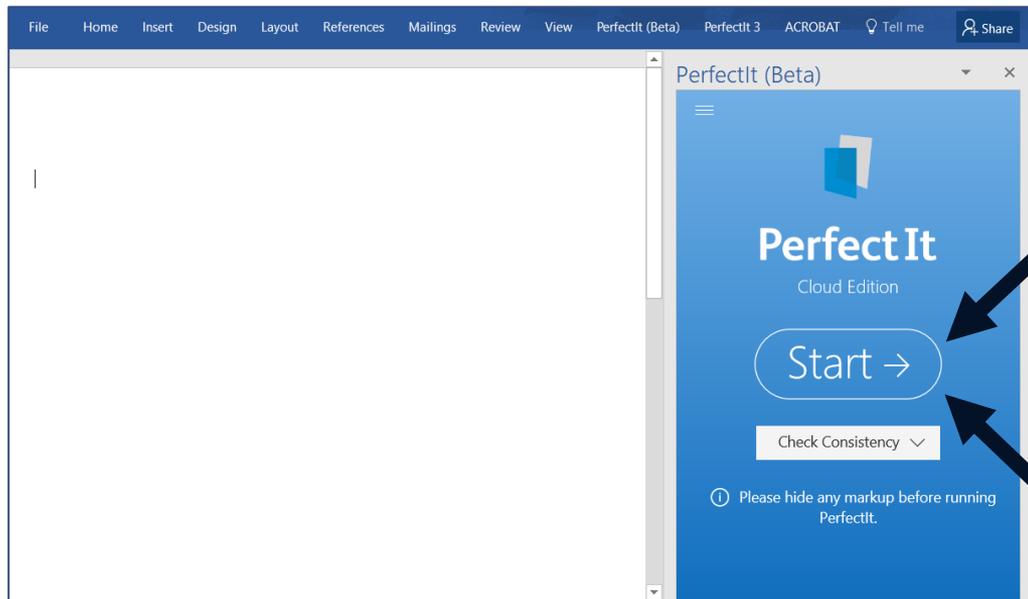


- **PerfectIt 4**
 - Windows edition
 - Released June 2019
 - Customizable
- **PerfectIt Cloud**
 - Mac-compatible
 - Install direct from the Office Store
- **All versions require MS Word to use**

INSTALLATION: ONLINE DOWNLOAD OR OFFICE STORE



WHICH BUTTON DO YOU PRESS FIRST?



SECURITY

PerfectIt can be downloaded on PCs and is entirely local

Once downloaded, it does not connect to the internet or local network in any way.

It **does not transmit any data anywhere**

With PerfectIt Cloud (Mac):

- Nothing is sent anywhere without your permission
- Secure connection (data sent via https)
- Servers located within Northern Europe and Canada
- Documents only exist on our server temporarily
- While on server, documents are encrypted

DEMO

PerfectIt Pro - Intelligent Editing

File Checks Customize Help

Hyphenation of Words

A phrase appears with and without a hyphen.

Choose preferred hyphenation

- cooperation [found 3 times]
- co-operation [found 3 times]

- ...and their continuing **co-operation** in... Fix
- ...for organizational **co-operation** and... Fix
- ...for delivering **co-operation** and... Fix

Fix All

Back Next

PerfectIt

Hyphenation of Words

A phrase appears with and without a hyphen.

Choose preferred hyphenation

- cooperation
- co-operation

- ...ontnuing **co-operation** in utilisi... Fix
- ...izational **co-operation** and some o... Fix
- ...elivering **co-operation** and sustai... Fix

Fix all

Previous Next

PRICING (USD, EXCLUDING VAT)



Licences

- 1 User: \$70 per year
- 20 Users: \$1127 per year
- 100 Users: \$3900 per year



Discount for Editors Canada Members

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- 30% Discount on a single license (\$49 per year)

QUESTIONS ON PART I?

PART II: OVERVIEW

- Objectives
- What Are House Styles?
- Using Built-In Style Sheets
- Creating Style Sheets
- Editing Settings and Style Points
- Find and Suggest

OBJECTIVES

- Goal is to make you comfortable with PerfectIt's Style Sheet Editor
- Comprehensive video tutorials on our website and YouTube:
 - <https://intelligentediting.com/videotutorials>

POLL

Have you customized style in PerfectIt before using the style sheet editor?

WHAT ARE BUILT-IN STYLES?

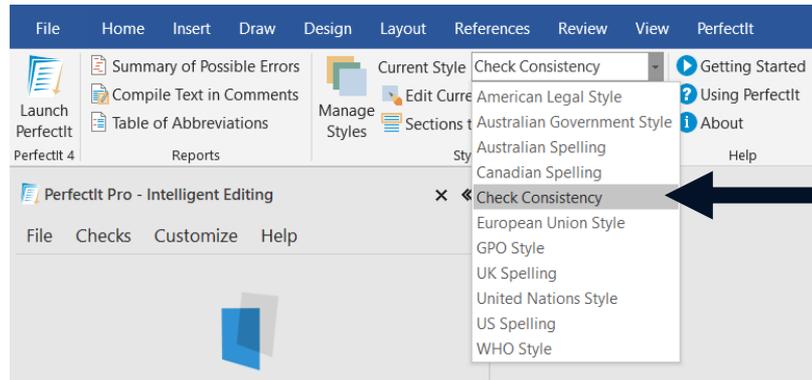
- Wide variety
- PerfectIt can check
 - Spelling
 - Hyphenation
- PerfectIt cannot check
 - Grammar
 - References
- PerfectIt can sometimes check
 - Numbers
 - Bullets
 - Personal titles
 - Capitalization

PerfectIt styles are for enforcing preferences in hyphenation, spelling and other terminology

PerfectIt styles do NOT relate to formatting or any other aspect of Word styles

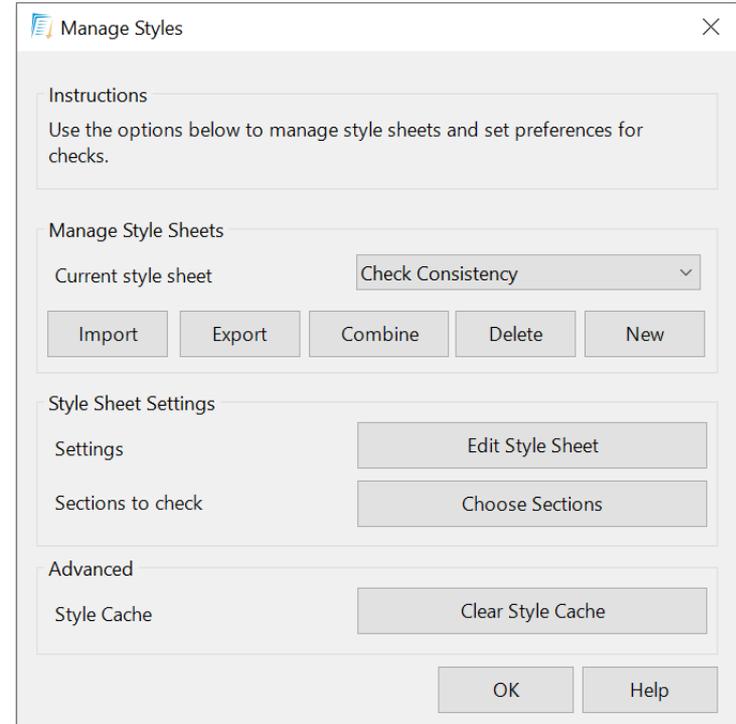
BUILT-IN STYLE SHEETS

- 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 list



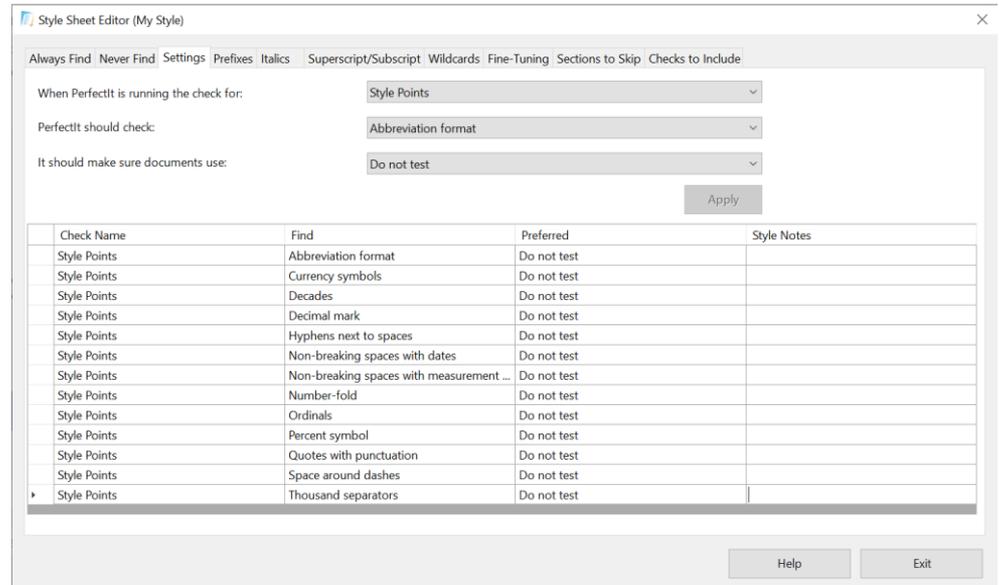
HOW TO CREATE A STYLE SHEET

- Open Word
- Click the PerfectIt Ribbon
- Click 'Manage Styles'
- Click 'New'
- Decide what to base it on (usually Check Consistency)
- Give the style sheet a name



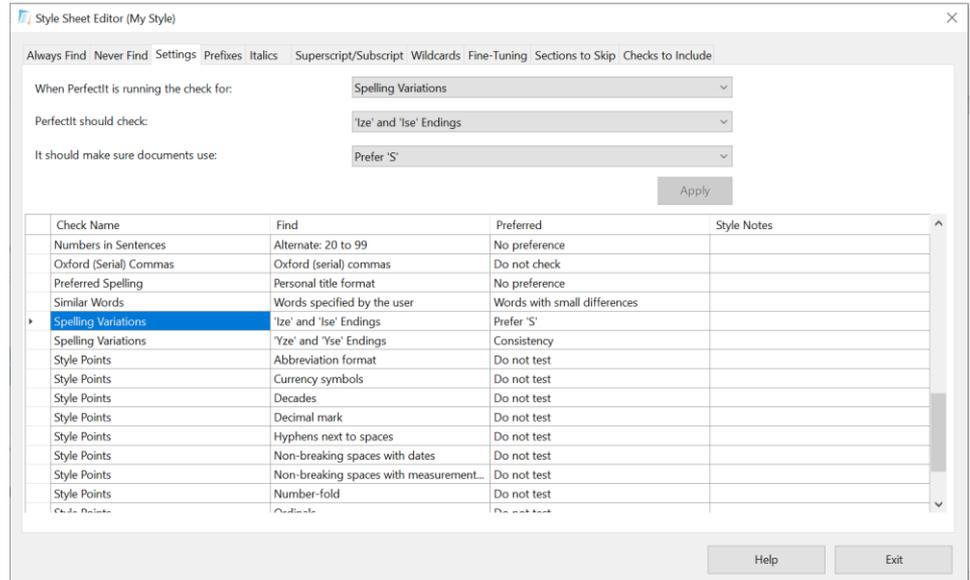
PERFECTIT'S STYLE SHEET EDITOR

- Select your style, click 'Edit Current Style'
- The tool for editing style sheets



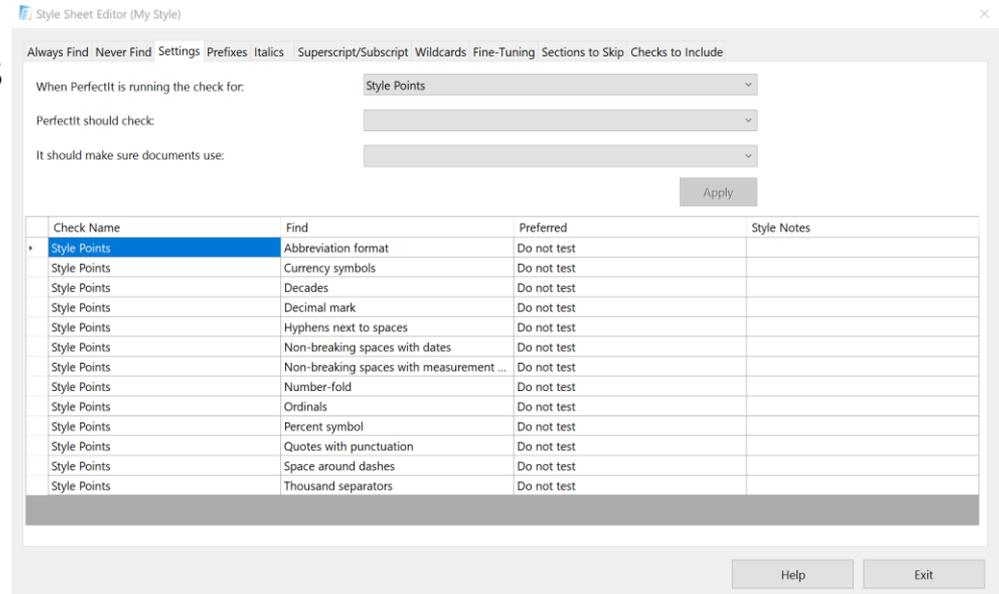
HOW TO EDIT SETTINGS

- Click the ‘Settings’ tab in the Style Sheet Editor
- Scroll down to ‘Spelling Variations’
- Click on ‘Ise’ and ‘Ize’ Endings
- Choose ‘Prefer Z’,
- Click ‘Apply’



SET PREFERENCES FOR STYLE POINTS

- Same controls as editing settings
- Set preferences for:
 - Abbreviation format
 - Currency preferences
 - Decades
 - Decimals
 - En dashes
 - Ordinals
 - And more!



FIND/SUGGEST

- Click the 'Always Find' tab in the Style Sheet Editor
- In the top dropdown, click 'Hyphenation of Words'
- In the first test box, type 'e-mail'
- In the second box, type 'email'
- Click 'Add'
- Note: Each pair is exact



FIND/SUGGEST

- Click the 'Always Find' tab in the Style Sheet Editor
- In the top dropdown, click 'Spelling Variations'
- In the first test box, type 'adviser'
- In the second box, type 'advisor'
- Click 'Add'



HOW TO ADD A USER NOTE

- Click the 'Always Find' tab in the Style Sheet Editor
- In the top dropdown, click 'Phrases to Avoid/Consider'
- In the first test box, type 'delay'
- Click 'Add'
- In the style sheet editor click 'delay'.
- Scroll to the right and in the 'Style Notes' column, type 'Watch for false friends. Make sure 'deadline' or 'limit' are not intended (délai does not translate to 'delay')

THE REST WORKS THE SAME WAY

Some more examples:

Capitalization

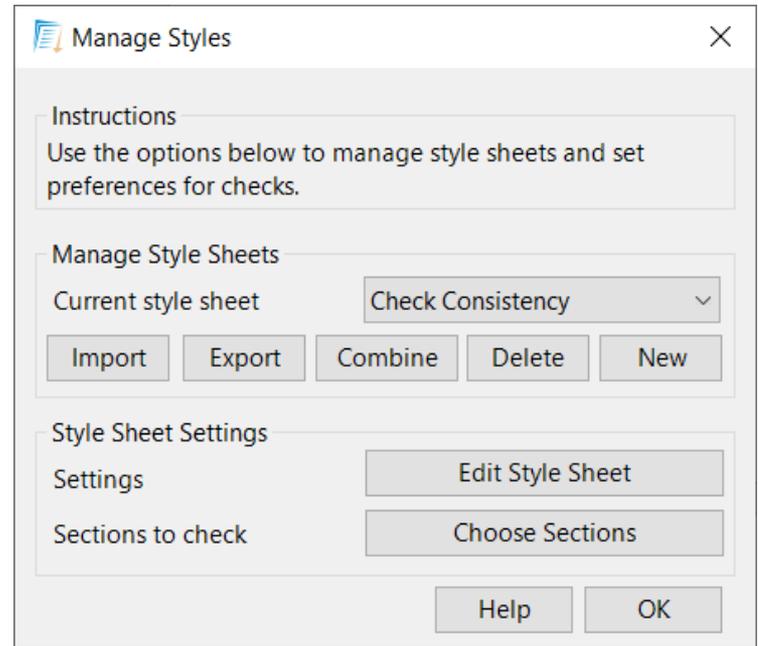
Acronyms

ADVANCED CONCEPTS

- Sharing Styles
- Style Layers
- Wildcard Find & Suggest

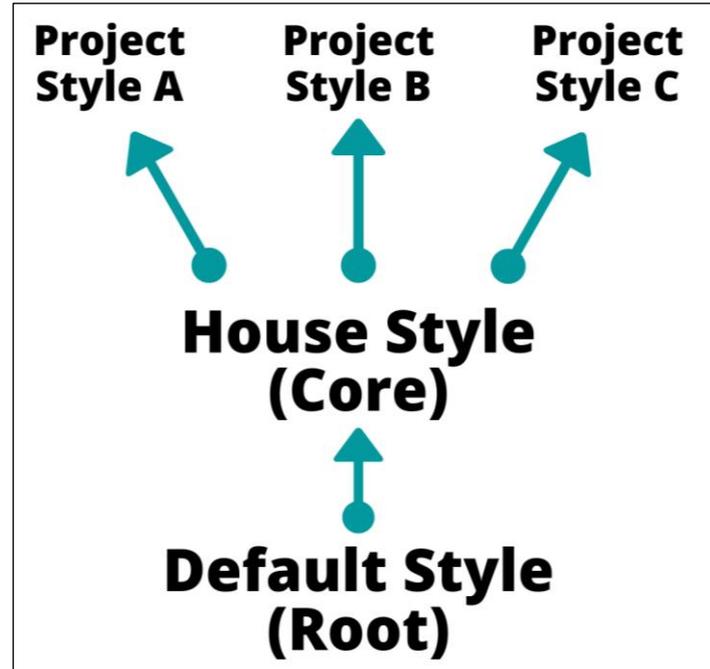
SHARING STYLES

- Click 'Export'
- Choose if you want the style to be editable
- Share the file
- Click 'Import'

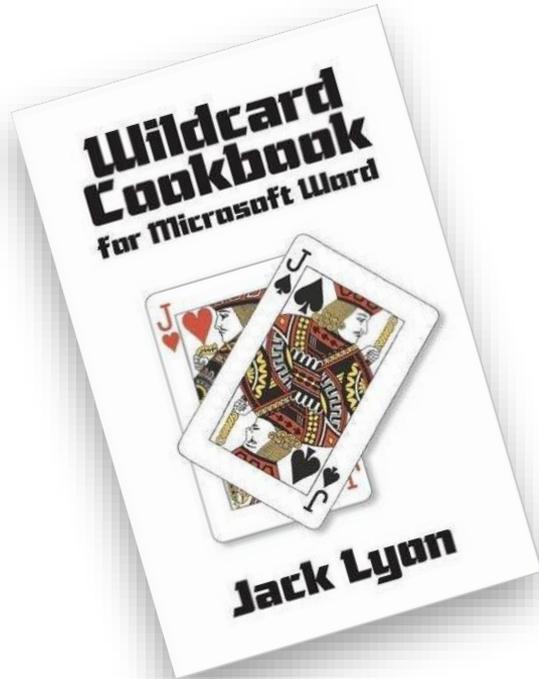


STYLE LAYERS

- Create layers of Styles
- Use Combine to bring them together
- Different styles for each client, department, or company



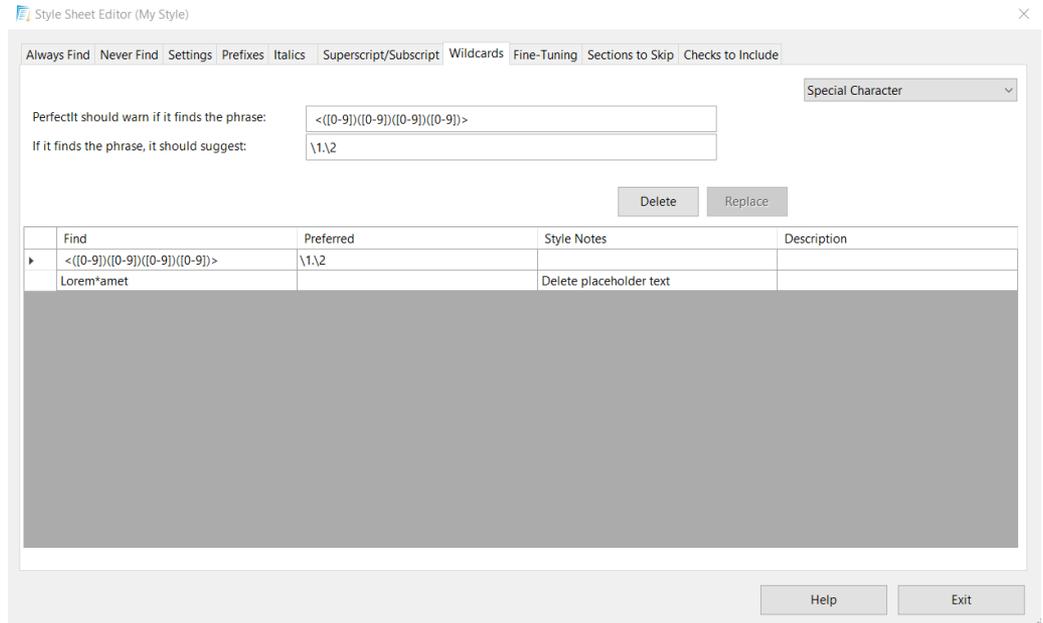
WILDCARDS



- Jack Lyon's Wildcard Cookbook for MS Word
<https://intelligentediting.com/wildcardcookbook>
- Graham Mayor's reference list
<https://wordmvp.com/FAQs/General/UsingWildcards.htm>

WILDCARD FIND AND SUGGEST

- Click 'Wildcards'
- Enter in all your wildcard F&R patterns at once



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QUESTIONS?



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