

# Formatting for Success

*tips for making your documents look  
more professional and user-friendly*

*a special publication from Firebelle Productions*

## **If It Doesn't Look Good, It Isn't Worth Reading!**

Although it may be an exaggeration to say that “if it doesn't look good, it isn't worth reading,” it is true that the nicer a document looks, the better chance there is that someone will read it. If your message is important enough to put in writing, it's worth making the document look good. Granted, sometimes you will be constrained by requirements beyond your control, but whenever you have a choice, create a good-looking document.

People do not often go out of their way to read something unless they *have* to read it or *want* to read it. If your document looks professional, attractive, and user-friendly, people will be more inclined to want to read it. If it looks ugly or difficult to read, they may simply ignore it. This publication is intended to encourage you to think not just of the *reader*, but of the overall *beholder*.

When you make an effort to make your documents look nice, it communicates to readers that you care about them and their needs, that you take pride in your work, and that what you have put in writing is important to you.

Everyone has a different opinion of what looks nice, but there are basic guidelines that most experts will agree on. Fortunately, you do not need to be an expert in desktop publishing to make your documents look nice. This publication contains tips that you can put to use immediately. These are techniques that can be used with most word processing programs.

## **Using Type for Emphasis**

Perhaps the simplest way to add emphasis is to do so with type. The most common techniques involve using **boldface**, *italics*, underlining, or FULL CAPS. Unfortunately, people sometimes misuse these techniques, creating a document that is difficult to read and unpleasant to look at.

**Boldface type** is generally the most effective way to make something pop out on the page. But too much bold type can undermine the intended effect and make the page look dark and intimidating.

**If your message  
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*Italic type* provides a subtle contrast to the main text. It is used primarily when subtlety, as opposed to strength, is desired. Since italic type is more difficult to read than plain text, it should be used sparingly.

Underlining is the least desirable, because it is hard to read. Readers have difficulty separating the words from the lines beneath them. Some letters are especially difficult for readers to identify because they run into the underlining: g, j, p, q, y.

### Using FULL CAPS ... or Not

Use full caps sparingly—if you must use full caps at all. And never use all capital letters for sustained reading.

When we read, we recognize not only the words themselves but also the shape of the words. Words set in upper and lower case have distinctive and recognizable shapes, whereas words set in full caps look like rectangles of different lengths. A simple graphic illustrates this concept:

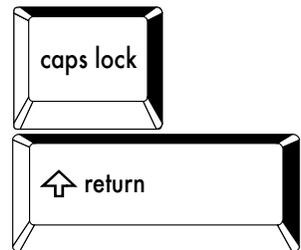


Pattern recognition is an important part of the reading process. It helps people process words more quickly. Conversely, the monotonous rectangular shapes of words set in full caps requires readers to spend more time and more energy reading the document. So people will have an easier time reading text written in upper and lower case versus text written in full caps. Don't make reading a document more of a chore than necessary. Don't create pages so ugly and uninviting that they turn readers off even before readers know what the message is about.

If you think full caps makes your message appear more important, dismiss the notion. In reality, full caps can have the opposite effect, making the text almost invisible as readers unconsciously dismiss it as too difficult to read. If you use full caps because you don't know how to capitalize properly, it's time to learn. Unless you're required to use full caps for a particular application, it's best to avoid it.

Additionally, most experts believe that type set in full caps appears to be shouting at readers. That, too, turns readers off.

**Use full caps sparingly—if you must use them at all. Never use all capital letters for sustained reading.**



**Text written in full caps is difficult to read, because the words lack the distinctive shapes that aid in pattern recognition.**

For better or for worse, industry standards may dictate the use of full caps in certain documents. For example, the captions, footers, and some of the text in legal documents are generally written in full caps. While it makes the text more difficult to read and makes it harder for readers to quickly distinguish between similar documents, it is the standard. I'm not opposed to bucking the standard when it enhances readability, but I prefer not to do so at the risk of creating the impression that I either don't know the correct way to format a legal document or have no pride in my workmanship. I stick with the industry standard so that the appearance of the document doesn't distract from the content or cause readers to think I'm not a professional.

### **Setting Type Aside for Adding Emphasis**

Setting type aside from the main body of the text can be a very effective tool for adding emphasis when used properly.

Setting type aside  
can provide extra emphasis.

There are times when readers will miss something because it was not given the emphasis it deserved. The sentence above stands out because it is set aside from the rest of the text. The extra white space around it and the different alignment draw attention to the sentence. However, it does not stand out as much as the example below.

### **Setting type aside can provide extra emphasis.**

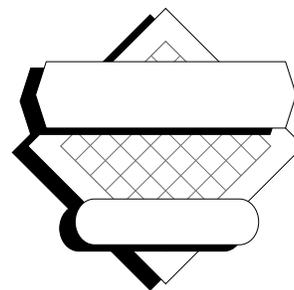
One example commands your attention as you turn the page. The other waits patiently to be noticed. If the type you set aside is too subtle, readers may miss it. On the other hand, too much large or bold type becomes offensive, because it seems to be shouting at the reader. Additionally, too many highlights on the page are confusing. Readers won't know where to focus their attention.

### **Using Headlines and Subheads**

Headlines and subheads are good organizational tools to help readers identify what information is being presented in the text that follows. Subheads help break the text into manageable segments and allow the readers to quickly locate specific information. They also add visual interest to the page by breaking up large expanses of text. This makes reading less of a chore, which increases the effectiveness of your message.

Headlines and subheads should be set off from the main text by using larger type, bolder type, or both. They may be set in a different typeface for greater contrast. They may be aligned differently from the body text. For example, they might be centered while the rest of the text is justified.

**Headlines and subheads are good organizational tools to help readers identify what information is being presented in the text that follows.**



**They also add visual interest to the page by breaking up large expanses of text. White space is an important design element both for visual interest and readability.**

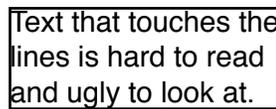
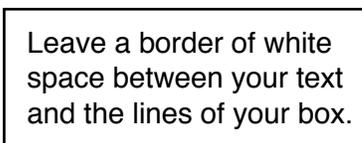
Because readers sometimes skip over headlines and subheads, you may need to repeat information in the text. In the first example below, if readers skip over the headline, they won't know what the pronoun *it* refers to. When readers must back up to reread the headline, it interrupts their train of thought, which detracts from your message.

*Confusing:*     **Report on Conditions**  
Provide it as soon as possible.

*Clear:*           **Report on Conditions**  
Provide a report on conditions as soon as possible.

## Using Boxes

Enclosing type in a box is another way to draw attention to important information. Use a line weight that will complement your type rather than compete with it. And leave a border of white space between the text and the box. Text that touches the lines is hard to read and ugly to look at.



Many software programs give you a variety of shapes and line weights to work with. There may not be one answer that stands out as being best, but some choices clearly stand out as being inappropriate. Remember, you want graphic elements to enhance your message, not compete with it.

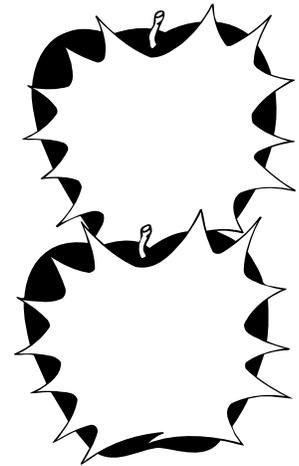
## Setting Type Against Backgrounds

When using text against a gray, colored, or patterned background, maintain enough contrast so that the type is easy to read. Consider using larger or darker type so that it stands out against the background. If the background is dark, you may need to reverse the text instead. However, studies have shown that black text on a white background is as much as 40% easier to read than white text on a black background.

The following illustration shows how changing the background, text color, type size, or type style can impact readability. Readability problems become more pronounced when the printer resolution is lower.



**Boxes, borders  
and other  
graphic elements  
can be used to  
draw attention  
to important  
information.**



**Choose graphic  
elements that  
enhance your  
message rather  
than compete  
with it.**

## Choosing Between Serif Versus Sans Serif Type

Type is grouped into two basic styles: *serif* and *sans serif*. Serif fonts have lines or curves projecting from the end of a letter, as in the top example in the sidebar. Sans serif fonts do not. Serifs help guide the reader's eye from one letter to the next. Therefore, serif type is considered better for prolonged reading.

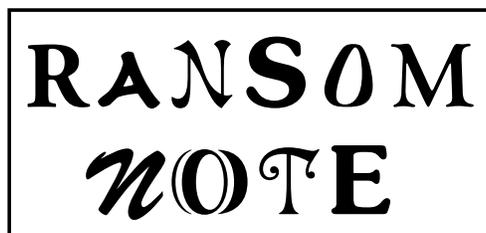
Sans serif fonts, on the other hand, are generally thought to be easier to read at very large sizes or very small sizes. They work particularly well for headlines, where the type is generally larger than the rest of the text. They also work well in documents where the type is small and space is limited.

Is It Serif or Sans Serif?		
serif	sans serif	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>Times</b>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>Palatino</b>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<b>Helvetica</b>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>Bookman</b>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<b>Avant Garde</b>

## Mixing and Matching Typefaces - Avoiding the Ransom Note Appearance

Should you mix and match typefaces? Using multiple typefaces can be appropriate if done wisely. For example, many graphic artists will use a serif typeface for body text and a sans serif typeface for headlines. That is appropriate.

However, if you use too many typefaces in the same document, it can make your message look like a ransom note pasted together with words cut from different sources. The type becomes a distraction, taking attention away from your message. The page looks messy and amateurish versus clean and professional. Careless intermingling of regular, bold, and italic can be distracting also, even when you stick with the same typeface.



**Serif type is generally better for prolonged reading, because serifs help guide the reader's eye from one letter to the next.**

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**Serif**

---

---

**Sans  
Serif**

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**Sans serif faces are generally easier to read at very large sizes or very small sizes.**

## Aligning Text

There are four basic options with respect to aligning text: justified, flush left, flush right, and centered.

*Justified text* is flush, or even, on both the left and right margins. Justification generally gives documents a neat, professional appearance. However, because the normal space between letters and words is altered in order to justify the text, justification sometimes results in uneven spacing.

*Flush left text* is even with the left margin and uneven, or ragged, on the right. Flush left text is relatively easy to read and allows even word spacing. It also eliminates the excessive hyphenation that can be distracting in justified text.

*Flush right* can be difficult to read, because we are used to reading from left to right. With flush right type, the reader has more trouble finding the beginning of each line. Flush right can be used for special effects, captions, or short sidebar comments. Excessive use of flush right is not recommended, however.

*Centered text* works well for most headlines, as well as for formal invitations and announcements. It does not work well for body text, because it is difficult to read for the same reasons that flush right is.

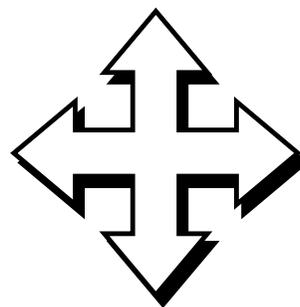
## Using Text Wrapping to Format Your Text

Finally, I want to hit on an important desktop publishing concern. The information is included for two reasons. First, if you are not setting up your documents properly, it can cause minor problems that are visible to your readers. Visible means distracting, which reduces the effectiveness of your message. Second, if you set up your documents properly, it becomes easier for you or someone else to edit them later.

One of the most common mistakes people make is failing to wrap text. Unlike a typewriter, the computer will automatically continue text from one line to the next when you come to the end of the line. There is no need to hit the Return key to bring the cursor to the beginning of the next line.

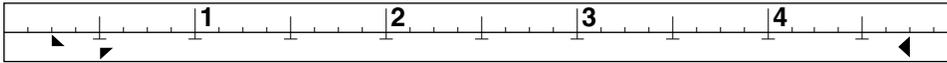
This becomes even more important when aligning text that is indented. The worst thing you can do is to hit the Return key at the end of the line, then tab or space over to where you want the next line to begin. Your text will never quite line up properly. And if you should ever have to edit the document, every word you add or delete will disrupt the spacing throughout the entire paragraph. If you change either the typeface or the type size, it will be a disaster.

**Justified text generally gives documents a neat, professional appearance, but it sometimes results in uneven spacing.**



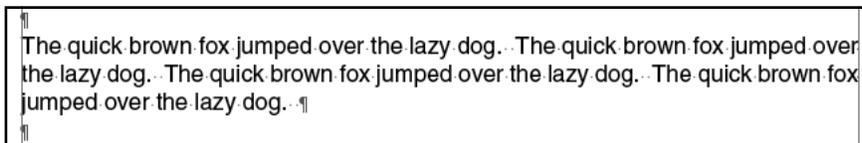
**Flush left text is relatively easy to read and allows even word spacing.**

Each word processing program contains some means by which to adjust margins, indents, and tabs. Look at your instruction manual if you are not familiar with how to do it. In Microsoft Word for the Macintosh, I format text using a ruler at the top of the screen. Other programs have similar features. The following illustration shows what that ruler looks like when I indent text as I did in the paragraphs below.

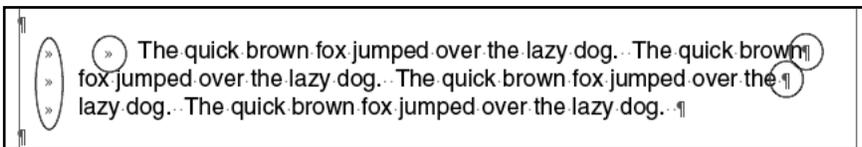


1. The little triangles in the ruler were adjusted to change both the margins and the first indent.
2. The only tabs here are between the numbers (1, 2, and 3) and the first word of each sentence.
3. Everything else wraps automatically according to the settings chosen.

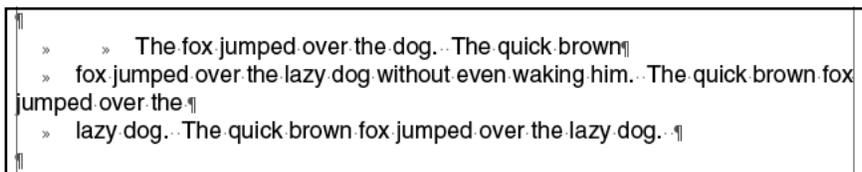
The following are screen shots (this time from Adobe InDesign) to help illustrate the problems that can arise when failing to use the formatting options built in to your software. The first screen shot below shows a simple paragraph that flows from edge to edge on the page. The hidden characters (paragraph returns, tabs, and spaces) were turned on in each screen shot to help you see the formatting.



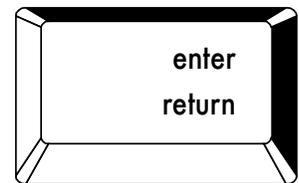
But what if you want to indent the first line and change the margins on both sides? If you didn't know how to use the software's formatting options, you might tab to where you wanted the first line to start, hit Return at the end of the line, and tab over again to begin the next line.



But as soon as you want to add or remove text, it creates a mess.

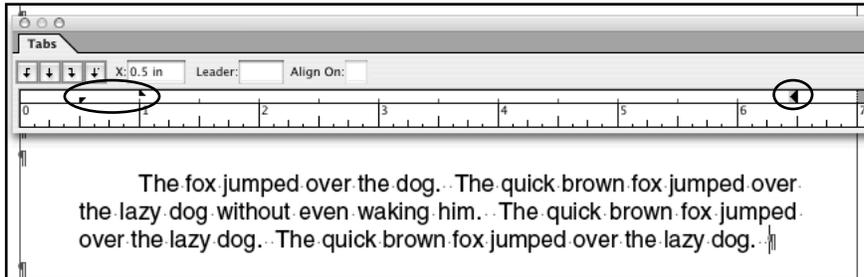


**The computer is not a typewriter. Allow your software to wrap text rather than hit the Return key at the end of each line.**

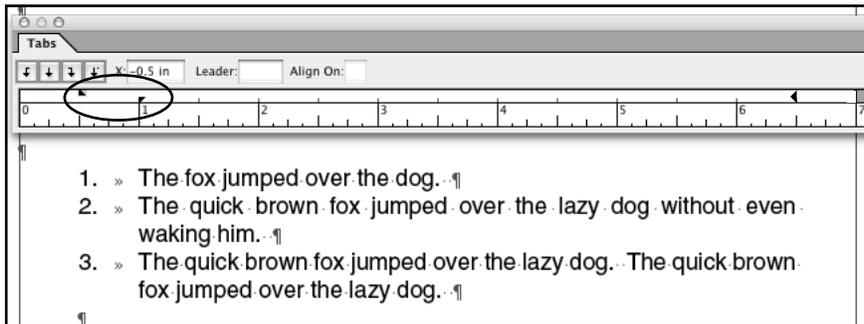


**Failure to use standard formatting options can result in a mess as soon as you want to add or remove text.**

By using the formatting tools available in almost every software package, you can align the text exactly as you want it, without relying on tabs and returns. Then if you need to add or remove text, the paragraph simply reflows without disturbing the formatting.

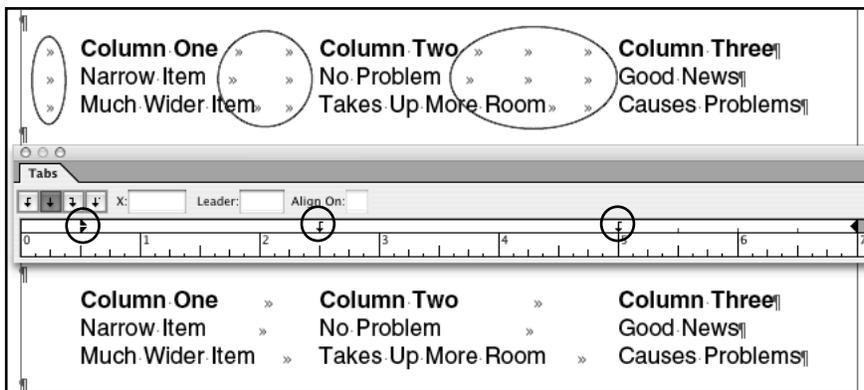


Here's a slightly different example, this time containing a numbered list.



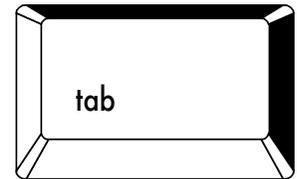
The same concept applies to formatting columns. Using multiple tabs to align columns can get messy, particularly if you ever have to edit the text. Compare the two tables below. The top one is aligned with multiple tabs. The bottom is aligned with the tab palette. This is the correct way to do it.

*Wrong*



*Right*

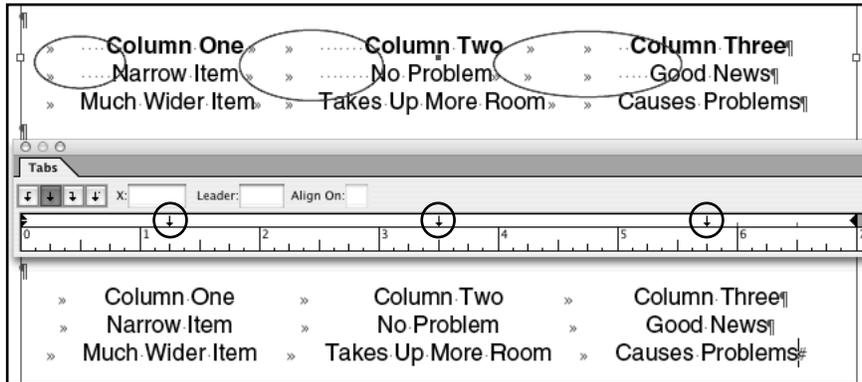
**Using multiple tabs to align columns can get messy, particularly if you ever have to edit your text.**



**By using standard formatting tools instead, you can easily align the text exactly as you want it.**

This final example is similar, except that because the columns are centered instead of left justified, one would have to use both tabs and spaces to simulate centering. Again, using the tab palette is the correct way to align the columns.

*Wrong*



*Right*



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Jill Meryl Levy  
Author and Publisher  
Firebelle Productions ([www.firebelleproductions.com](http://www.firebelleproductions.com))

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