



## Developing your own document style

### Background

Producing documents has probably never been easier than it is today, with the wealth of software designed to ease the task. Word processing software is most commonly used with Desktop Publishing Software ( DTP ) being used by more specialist personnel .

Irrespective of the choice made the user is still left with the issue of how to make a document “look good” or to conform to someone else’s idea of how the document should appear. Some approaches are prescriptive and state in considerable detail ( eg. MLA Style Manual - [http://owl.english.purdue.edu/handouts/research/r\\_mla.html](http://owl.english.purdue.edu/handouts/research/r_mla.html) , APA Style Guide - <http://www.apastyle.org/>, Chicago Manual of Style ) how the document should be formatted. These include details such as :

- ◆ Font names and sizes to be used
- ◆ Line spacing
- ◆ Margins
- ◆ How to cite authors and sources
- ◆ Headers, Footers

Whilst these may be interesting to users who are preparing documents that match the assumptions of those who developed the style guides they do not necessarily help users wishing to develop their own style.

### What will the style be used for ?

Before one starts trying to create a style there are some questions that one should ask about the intended use of the style :

- ◆ Is it intended to support pocket or other special sizes ?
- ◆ Is it going to appear on the internet ?
- ◆ Does it need to conform to accessibility guidelines ( <http://www.w3.org/TR/WAI-WEBCONTENT/>. ) ?
- ◆ How are documents going to be bound ( book fold, single sided or double sided pages etc. ) ?

Some of the answers to these questions will impose constraints on the style. The use of customised fonts, for example, is not particularly successful when these will be mapped onto a standard alternative font when the document is viewed by someone who doesn’t have the custom font ( this affects web pages, and word processed documents ).

This document doesn’t consider in detail the formatting needs of special sizes or presentation that would naturally fit onto standard document sizes like A4 or Letter.



## Why are users reading documents based on the style ?

The user may be :

- ◆ reading it in a sustained manner and seeking to extract meaning from the majority of the document. In this case the format may be longer passages of prose using the conventional one theme per paragraph.
- ◆ reading it intermittently, in which case it is best if the information is in short passages , with whitespace or illustrations that help the user find their location again quickly. It can also be easier here to use narrower columns ( like newspapers ) if the software supports it.
- ◆ cross referencing and commenting on the material and therefore needing plenty of whitespace, numbering and other indications so that insertions and notes can be made easily; and sections can be found again at will.
- ◆ reading it under protest. In this case the style will need to be clear, the text relatively short and the overall impact must be of a confident author presenting material.

## Using Headings

One reasonable guidelines for the use of headings is given in the table below. This allows the Headings to stand out from the rest of the text and act as signposts.

	Space Above ( lines)	Space Below ( lines )
Heading 1	2	1
Heading 2	2	0
Heading 3	1	0

Headings tend to look better if they don't use a font with serifs ( 'ticks' which are used to join letters together ) as these look 'forced' in larger font sizes.

Organising headings so they are to one side of the text give the effect of indexing the text rather than organising the text into coherent subsections.



## Fonts and sizes

Design of typefaces is a complex and specialist skill, and most of the basic rules were developed long ago by printers. For most users the choice given by the operating system and word processing or DTP package will be more than adequate. TrueType fonts are the default scalable fonts used on Microsoft operating systems.

Most documents will probably look best if no more than two different fonts are used. For instance the Microsoft Word Normal template uses Arial for its Headings and Times New Roman for its normal text. Bullet characters are often found in special fonts such as Wingdings or Symbol.

Font sizes are traditionally expressed in points. The normal size for plain text in documents produced by organisations is 11 or 12 pt. Lines should allow some whitespace between the bottom of the lowest letter on one line and the top of the tallest letter on the line below. Thus if 1 point gap were to be left then 11 point font would be on a 12 point pitch. Common choices are a 1 or 2 point gap.

Larger font sizes can be used for headings within reason, but in the same way that too many capitals can give the impression of “shouting”, use of unnecessarily large font sizes can detract from the user experience. This document uses size to a limited extent ( a maximum of 2 points ) with bolding to differentiate headings from surrounding plain text.

## Emphasis and other variations

Using bold to create emphasis is a relatively easy method that looks good providing it isn't used too much, and it doesn't detract from the headings.

*Italics* look different, and weaker than regular text. It can be useful to distinguish text from the mass of plain text.

Underlining doesn't look very good and tends to be avoided in most corporate documents.



## Indentation and alignment

Achieving indentation is a really fast way to improve the overall appearance of a document. In principle most blocks of text should be aligned vertically underneath one another. If simple bulleted lists are used then the bullet should appear vertically below the left hand edge of a non bulleted line with the text indented a small amount. A similar consideration applies to numbered lists.

Sometimes the indentation may be adjusted so that the first line in a single paragraph either projects to the left of the following lines ( hanging indent )

*This is a hanging indent paragraph with a number of words to show how successive lines will look with this appearance.*

or is to the right of the following lines ( left indent )

*This is a hanging indent paragraph with a number of words to show how successive lines will look with this appearance.*

Both of these can look alright in the appropriate circumstances ( long prose sequences ) but neither work well if there are bulleted or numbered lists because the bullet or number doesn't stand out properly from the rest of the plain text.

*Sometimes it is worth changing the indentation for emphasis, or because the text block is a quotation. This change needs to be fairly major in order to that the user doesn't see it as a mistake.*

Justification is a particular setting where text is constrained to lead to vertical lines at both the left and right hand sides of the page. It can lead to somewhat unnatural gaps between words and rivers of whitespace flowing down the page. For this reason it should be used with caution.



## **Line spacing**

Line spacing in most word processors allows a variety of settings. It is important to understand the difference between spacing between paragraphs and that between successive lines. A paragraph is a unit of text without deliberate carriage returns. Thus a block of text may have embedded ( hard ) carriage returns and therefore actually be understood by the word processor as consisting of many paragraphs. Some sophisticated packages like Microsoft Word allow spaces to be set both before and after a paragraph.

Within a single paragraph line spacing can be set perhaps by reference to a single line spacing ( 1.5 times, double ) or by a number of points ( see font sizes above ).

## **Margins**

In general deliberate manipulation of margins should be avoided because the default margins are usually set to correspond with reasonable values that the printer can support ( desktop printers can't print to the edge of a sheet ).

If you need to set margins then right and left margins should be equal if working on a single page layout. If the pages are to face one another then the inner margins ( those that will go into the binding ) should be half as wide as those on the outer edges.

The top margin should be less than or equal to the bottom margin to avoid the impression that the text is falling off the page.

## **How many text styles ?**

Within your overall style there may be a number of styles from the point of view of the DTP or word processing package. In principle there should be a style for each differently formatted piece of content. So for example a reasonable starting list would be :

- ◆ Heading 1
- ◆ Heading 2
- ◆ Heading 3
- ◆ Plain Body Text
- ◆ List Bullet
- ◆ List Number

Try not to use the default style and then apply all the differences just by selecting bold, font size etc. This just negates the purpose of styles as all the paragraphs will be identified by the package as having their own custom rules and there will be little or no opportunity to make global modifications ( to all bulleted text for example ).



## **Credits**

Author : V.L. Riley - Kutchka Ltd

*Producers of DocTidy – an automated formatting software package for achieving consistency in Microsoft Word documents*

John Miles : Design for Desktop publishing

*Still a great book for understanding the arts that printers have developed over centuries and the electronic world needs to remember.*