Document Design and Formatting

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[Video](https://linnbenton.hosted.panopto.com/Panopto/Pages/Viewer.aspx?id=a51f3fbc-5078-47a6-8b09-b01a014c49ec&start=0)

[Slide Deck](https://docs.google.com/presentation/d/1zTa-XYMRAC1tkHKbqYavuZ9EPj4wpQIlGW2Yx3uZPbo/edit?usp=sharing)

# Goal

In this presentation, we will discuss how to design and format a technical document. This is the one where we will talk about how to make your work stand out from the rest.

# CRAP

Robin Williams (no, not the actor), in *The Non-Designers Design Book* (1993), broke document design into four aspects:

* Contrast: Setting apart the elements from one another. This way things do not blend into one another.
* Repetition: Repeating visual and textual elements for consistency. This helps readers understand what belongs together and avoids confusion and awkwardness.
* Alignment: Arranging the elements on the page. Often you can visualize a grid and where things are placed in that grid to achieve visual balance.
* Proximity: Having related elements close together to avoid confusion.

As we discuss factors of document design, consider these core four aspects. At the end, we will review and see them in action.

# Fonts

Let’s begin with the font. We have many choices, but which are the best?

When looking at font styles, you will notice that they fall into two categories: serif and sans serif. Serifs are the decorative elements of the font. Some people call them feet or strokes. A couple examples of this font are Times New Roman and Lobster. If you look closely, you will notice that they have decorative elements.

The other category is sans serif fonts. These are simple and do not have those decorative elements. For example, Arial and Tahoma.

When you use fonts for contrast, choose one serif and one sans serif. Mixing two serif fonts can be overwhelming to the eye. Also having more than two different fonts could look chaotic, so keep the number to two if possible. You can always set sections and fonts apart by using elements such as color, bold, italics, or different sizes.

# Headings

Use a different font, size, and/or style for the headings. For consistency and accessibility (think screen readers), use the preset heading styles in the word processing program, such as in Microsoft Word or Google Docs. In addition, be consistent with how you use headings: they should be parallel (using the same grammatical pattern)--Here, we have the example of “Preparing the machine,” and “Cleaning the floor.” Preparing and cleaning follow the same pattern, so we say they are using parallel structure or parallelism.--be the same font, and be placed in the same area as the other headings. (If having them left justified, the headings with the same level should all be left justified.)

# Lists

Use the same pattern (as we were just talking about, parallelism) for numbered and bulleted lists.

# White Space

You want to think about spacing strategically. White space is important for giving the eyes a break from text and showing what belongs with what. In the case of block paragraphing, which is often used in technical writing, you use an extra space between the paragraphs to show that a new paragraph is beginning. You might also use extra space around visuals and/or just to allow for a break in the visual field.

# Alignment

When thinking about alignment, consider the visible and invisible lines on the document: where the font is placed, where the headings are placed, and where the text and images are placed. Also consider the balance. If using a visual, where and which side of the document are important when considering if the page will look balanced. For example, if you have headings on the left side, you will probably want to put the image on the right because the larger (and possibly darker) text of the headers will balance the visual on the right. Also consider the hierarchy. What is most important and does it show in terms of text and visual alignment.

# Proximity

Proximity means that you have similar elements and pieces of information close to each other and set apart from other information. For example, a heading should not be at the bottom of the page if the information is on the next page. (In that case, use a page break to get the heading to the next page.) When considering visuals (images, graphs, and such), make sure they are in close proximity to the text that refers to them. For example, you would want a labeled picture next to, above, or below the paragraph that discusses the picture.

# Video

Now let’s watch a video that discusses and demonstrates the CRAP principles in more detail.

# Conclusion

As you write your technical documents, do not forget to use these principles of document design. They will not only help the audience as they read and understand the information, but will also help your document stand out.