

Guidelines for Text and Document Design

At some point, nearly all teachers and trainers develop documents to support their training, both for online and for print. These can be primary sources of content, or materials that support learning activities and information provided in other forms, such as handouts to summarize presentations. The following guidelines provide some general principles derived in part from a review of research, primarily that provided by James Hartley (see www.aect.org/edtech/ed1/34.pdf). Some updated guidance is included.

Fonts and Typefaces

- Font sizes should be appropriate for the context and format of documents, neither too large to make reading slow, or too small to make it difficult to view. Adaptable CSS styles can allow fonts to match the device on which they are displayed.
- Varying font sizes can distinguish content type, such as headings and subheadings (larger), body text (moderate) and notes (smaller).
- Choice of font sizes constrain the potential length of lines. Short line lengths inhibit readability by breaking meaningful phrases across lines. So, large fonts should be reserved for headings.
- Serif typefaces (those with small extensions or widening at the ends of the lines within letters) are usually suggested to be more readable in printed documents because they provide better guidance for the eye in distinguishing the letters within words. However, in documents to be read on computer screens or using small font sizes, sans serif typefaces can be better due to lower resolution. Serif typefaces are often limited in use for headings in e-documents.

Serif examples	Sans-serif examples
Times Roman	Arial
Cambria	Calibri
Century Schoolbook	Verdana

- Capital letters are harder to distinguish from one another because they each occupy similar space: CAPITAL LETTERS vs. Capital Letters. Using only initial capitals in headings and titles, can be good practice.
- *Italicized letters* are more difficult to read because their spacing is smaller. They should be used only for *emphasis* or in special cases, such as *captions*.

- Colours should be used sparingly, for **emphasis** or for headings.

Spacing

- Spacing of text acts as a cue to aid understanding and efficiency in reading text. Spacing helps the eye distinguish meaningful units. This includes word spacing (horizontal), and line spacing, paragraph spacing, and section spacing (vertical).
- Left and right justification affects readability.
 - ⇒ Full justification, in which the lines of text are all of equal width and aligned both on the left and the right, can look more elegant from the viewpoint of formality, but it is considered harder to read because letter and word spacing must vary to compensate for alignment. In addition, lines may not break at logical units, such as the end of sentences and paragraphs, which can disrupt eye flow. This is particularly true when line length is short.
 - ⇒ Left justification is usually shown to facilitate the reading of larger bodies
 - ⇒ of text, allowing the eye to return to the same place at the start of each line, and preserving consistent spacing of words and letters.
 - ⇒ Fully centred text can be very difficult to read when used for multiple lines of text, because it disrupts eye flow. It should be preserved for headings, where lines are short.
- Margins are useful because they keep the lines of text of reasonable length. Very long lines of text can difficult to read. However, very wide margins are distracting and wasteful, unless intended for making notes or binding printed documents on one edge.
- Vertical spacing between paragraphs can make reading easier than simply indenting the first line, except in large bodies of text like books, where it becomes wasteful. It also helps when paragraphs are short.

Indicating Text Structure

- Complex text should be broken into logical units to aid understanding. These logical units can be indicated by headings and subheadings, numbers, and numbered lists and bullets. These devices aid navigation for review as well as initial readings.

- Titles and short summaries at the start and/or end of texts provide cues to the reading of the structure, and aid understanding and recall.
- Outlines or tables of content provided at the start of complex text serve the same purpose, and can aid navigation.
- Using text boxes for blocks of text that are optional or asides to the main flow can facilitate reading and navigation, unless overused.
- Headings and subheadings are an effective way to indicate the structure of text, but like many text devices, should also not be overused unless the document is strictly for reference, and not intended to be read sequentially.

Text boxes can also be used to highlight key passages or points from the document, which both reinforces the content, and provides visual variety. Of course, graphics and images also serve the same purposes, and provide alternative ways to present information—often better than text alone.

- ⇒ Headings should be short and logical, and set off in terms of font style.
 - ⇒ Questions can make very useful headings, since they prompt the reader to consider the intent of the upcoming text, or indicate how it can be applied.
 - ⇒ Numbering of headings can be unnecessarily distracting, unless the document is formal and the sections will be referenced independently, such as for legal documents and technical standards.
- List of points or steps are more easily read on separate lines than within a paragraph. These can be indicated by numbers or bullets. Bullets should be kept simple so they do not distract from the text.
 - ⇒ Number lists should be used when the items in the list will be referenced independently or when they imply a sequence of steps.
 - ⇒ Bullet lists are more appropriate for items that are not listed in sequence or are of equal importance.

Word Use and Sentence Structure

- Transition words and conjunctions, such as *however*, *but*, *therefore*, *on the other hand*, and other such words and phrases, can be critical to aid understanding in difficult texts.

- Shortness is a virtue at all levels of a document—words, sentences, paragraphs, and chapters—for increasing readability and understanding.
 - ⇒ Long sentences, while stylish in literature, can be very difficult to read in instructional texts due to the many clauses they likely contain. This may be particularly true for readers that have another native language.
 - ⇒ However, too many sequential short sentences can become boring and actually decrease understanding by lacking sufficient context and potentially increasing ambiguity.
 - ⇒ Word length can make reading more difficult as well. Concrete language is more quickly understood. However, precision in language is important in technical texts.
- Acronyms should be defined in the first use, but avoided if possible to aid readability.
- Readers usually interpret active voice more quickly and more easily than passive voice.
- Readers comprehend positive terms more rapidly than negative terms. Consider the negative and passive opposite statement: “Negative terms are more slowly comprehended than positive terms.” Negative statements can also be misinterpreted more frequently than parallel positive statements, especially when used within instructions and questions.
- Including frequent examples within text can help comprehension. Demonstrating what is meant, rather than simply describing what is meant, supports understanding.