

Creating Visually Effective Documents

Like all decisions related to technical communication, page layout and document design are based on informed choices. You make decisions about fonts, format, headings, page size, and other aspects based on the document's audience and purpose. For example, imagine that you are asked to produce a brochure for a physician's office. The brochure's audience is patients who have a heart condition and may need a specific type of heart surgery. The brochure's purpose is to explain the procedure, answer frequently asked questions, and review the risks while reassuring patients.

Before you would even begin to think about what to write or how to format the document, you would do an audience and purpose analysis (see Chapter 2). If you learned that the brochure also needed to include a list of tasks, such as a checklist of actions patients need to take, you might also conduct a task analysis (explained in Chapter 3). Your analysis would yield important information. For example, you might learn that patients are frightened and that patients are often older and may have difficulty reading small type. These facts would be important not only as you wrote the copy but also as you thought about designing the document. Frightened patients might prefer to read a document that is soothing to look at. You could choose a comforting typeface, pleasant graphics, and a warm color for the paper. Also, because your audience has trouble reading small type, you would make sure the font is large enough to be read easily.

As you can see, document design, like all technical communication, puts audience and purpose first. In designing your document, consider the features discussed in this chapter.

How Page Design Transforms a Document

To appreciate the impact of page design, consider the fact sheets shown in Figures 8.1 and 8.2. The information presented in Figure 8.1 resists interpretation. Without design cues, we have no way of chunking this information into organized units of meaning. Figure 8.2 shows the same information after a design overhaul.

How Readers View a Page

When you design information, consider how most readers look at a page. Generally, they view it first as a whole unit, scanning the page quickly to get a sense of the overall layout, look, and structure. Readers try to make sense of the document and determine its "road map." They ask questions such as these:

- What is the main title?
- What are the primary headings?

Mold is a public health problem. Molds are simple organisms that are found virtually everywhere, indoors and outdoors. The potential health effects of indoor mold are a growing concern. Mold can cause or worsen certain illnesses (e.g., some allergic and occupation-related diseases and infections in health care settings). There is not conclusive evidence, however, about whether indoor mold is associated with a multitude of other health problems, such as pulmonary hemorrhage, memory loss, and lack of energy.

The Centers for Disease Control has accomplished much on the problem. The CDC has a mold Web site (<http://www.cdc.gov/nceh/airpollution/mold>) that provides information on molds and health and links to resources. In conjunction with the Council of State and Territorial Epidemiologists, the CDC has created an inventory of state indoor air quality programs which is available at http://www.cdc.gov/nceh/airpollution/indoor_air.htm. The CDC assists states in responding to mold-related issues, including offering technical assistance with assessment, cleanup efforts, and prevention of further mold growth and unnecessary exposure. The CDC is strengthening state, local and tribal capacity to respond to mold-related issues, including: determining the extent to which state programs establish coordinated responses to indoor air exposures, working with federal and other organizations to coordinate plans related to indoor air and mold, developing a coordinated public response strategy, and identifying resources for developing and implementing responses. The CDC is also developing an agenda for research, service, and education related to mold. As a first step, the CDC contracted with the Institute of Medicine (IOM) to conduct a study on the relationship between damp or moldy indoor environments and the manifestation of adverse health effects and to provide recommendations for future research. The CDC's mold-related agenda is expected to address subjects such as the following: characterizing environmental conditions that allow mold growth indoors and the association between indoor mold and disease or illness; improving the capacity of state, local, and tribal health departments to prevent, investigate, and control mold exposures; and conducting and supporting research to define the association between damp or moldy indoor environments and harmful health effects.

The next steps the CDC will take include assisting states and others in responding to mold issues and developing an agenda for research, service, and education related to mold as described above. For more information, visit <http://www.cdc.gov/nceh/airpollution/mold>.

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Examples
of
effective
page
design

Figure 8.1 Ineffective Page Design. Notice that the entire page is in the same font and does not provide the reader with any guidance as to how the information is structured. A quick scan of this page imparts little new knowledge, if any.

By asking themselves these questions, your audience is trying to determine the *visual hierarchy* of the page based on its layout and design. The main items of importance should be in the primary headings and the secondary items in the second level of headings.

As you create your document, determine which subject areas constitute the main (first), second, or third level of headings. (More than three levels of headings can confuse your audience.) Make sure that headings at the same level use the same font and the same grammatical structure.

Look back at Figure 8.2 for an example of a page that provides a clear visual hierarchy. Even if you view it from far enough away that you can't make out the actual words, you can still see that the page has a structure: main headings and explanatory text.

Electronic Pages

Readers view electronic pages much as they do the printed page. For instance, they skim the page looking for headings, tables, charts, main topics, and visuals, seeking the visual hierarchy. But with electronic pages, there are some important differences.

Web pages are often cluttered with too many links, flashing icons, and bright colors, more so than on a printed page because these features are easy to place on a Web site. If there are too many distracting features, however, readers often end up feeling disoriented or overwhelmed.

Computer screens are shaped very differently from the printed page, so items at the edge of the screen can get lost or become hard to track with the human eye. *Electronic text* can be fuzzier than ink on paper. Also, electronic text is actually made up of tiny pixels and can appear to be moving or “buzzing” on the screen. Both of these characteristics make it harder to read information on a computer screen.

With these items in mind, make sure that electronic pages are designed for simplicity and ease of use. Keep text to a minimum, and don't overdo the fancy icons and flashing fonts.

Formatting the Page Effectively

The term *page* is imprecise when you consider electronic documents. What constitutes a page? On the computer screen, a page can go on forever. Also, *page* might designate a page of a report, but it can also refer to one panel of a brochure or part of a quick reference card. The following discussion focuses primarily on traditional paper (printed) pages. See “Designing Electronic Documents” later in this chapter for a discussion of pages in electronic documents.

The design and layout of a page play an important role in how your audience will react to and interact with the information. If a page is organized poorly, readers won't be able to find what they need. And if a page or document is unattractive, readers won't be enticed to explore it. Readers expect each page to be visually appealing, logically organized, and easy to navigate.

Page and document design is an art that takes practice. More and more software is being developed to help people with page layout and document design, but all the software in the world won't help unless you know something about how readers deal with text on a page.

PROGRAM IN BRIEF

Mold

WHAT IS THE PUBLIC HEALTH PROBLEM?

Molds are simple organisms that are found virtually everywhere, indoors and outdoors. The potential health effects of indoor mold are a growing concern. Mold can cause or worsen certain illnesses (e.g., some allergic and occupation-related diseases, and infections in health care settings). There is not conclusive evidence, however, about whether indoor mold is associated with a multitude of other health problems, such as pulmonary hemorrhage, memory loss, and lack of energy.

WHAT HAS CDC ACCOMPLISHED?

- CDC's Mold Web site (<http://www.cdc.gov/mold>) provides information on molds and health and links to resources. In conjunction with the Council of State and Territorial Epidemiologists, CDC has created an inventory of state indoor air quality programs, which is available at http://www.cdc.gov/nceh/airpollution/indoor_air.htm.
- CDC assists states in responding to mold-related issues, including offering technical assistance with assessment, cleanup efforts, and prevention of further mold growth and unnecessary exposure.
- CDC is strengthening state, local, and tribal capacity to respond to mold-related issues, including (1) determining the extent to which state programs establish coordinated responses to indoor mold exposures; (2) working with federal and other organizations to coordinate plans related to indoor air and mold; (3) developing a coordinated public response strategy; and (4) identifying resources for developing and implementing responses.
- CDC is developing an agenda for research, service, and education related to mold. As a first step, CDC contracted with the Institute of Medicine (IOM) to conduct a study on the relationship between damp or moldy indoor environments and the manifestation of adverse health effects and to provide recommendations for future research. CDC's mold-related agenda is expected to address subjects such as the following:
 - Characterizing environmental conditions that allow mold growth indoors and the association between indoor mold and disease or illness;
 - Improving the capacity of state, local, and tribal health departments to prevent, investigate, and control mold exposures;
 - Conducting and supporting research to define the association between damp or moldy indoor environments and harmful health effects.

WHAT ARE THE NEXT STEPS?

CDC will continue to assist states and others in responding to mold issues and develop an agenda for research, service, and education related to mold as described above.

For more information, visit <http://www.cdc.gov/mold>.

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DEPARTMENT OF HEALTH AND HUMAN SERVICES
CENTERS FOR DISEASE CONTROL AND PREVENTION
SAFER • HEALTHIER • PEOPLE

FIGURE 8.2 Effective Page Design. Notice that the first sentence of each paragraph has been set as a question designed as a major heading. Note the use of bullets, white space, internal numbering, and an identifying masthead at the top of the page, all of which make the material easier to read and remember. On the Web site, you will also notice the effective use of hyperlinks and color.

Source: U.S. Department of Health and Human Services, <http://www.cdc.gov/nceh/airpollution/mold/pib.pdf>.

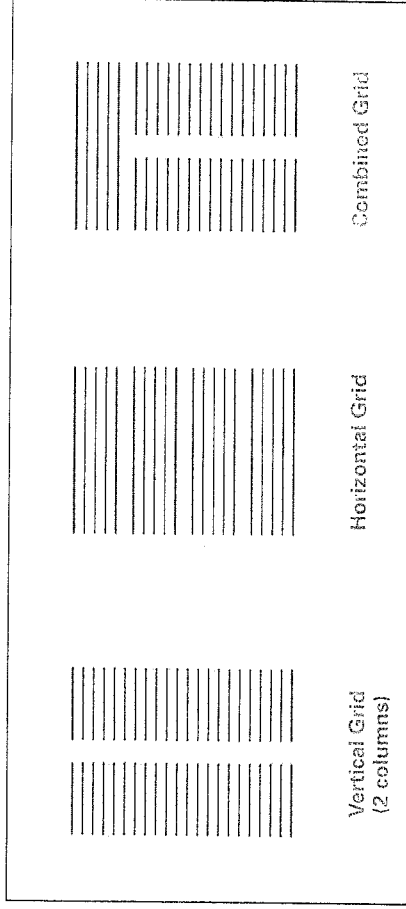


Figure 8.3 Grid Patterns. Grids provide a blueprint for page design.

Using a Grid Structure

Grids help readers make sense of material, because they create an underlying structure for the page. Figure 8.3 shows a sampling of grid patterns.

A two-column grid is commonly used in manuals. Brochures and newsletters typically employ a two- or three-column grid. Grids are used as frameworks or outlines to provide a coherent visual theme to a document. This consistent layout allows readers to anticipate what they will find on the next page. For instance, when reading a standard newspaper, you expect to find columns. When looking through a brochure, you expect the information to maintain a consistent look and feel throughout. Many page layout programs allow you to create grids easily and quickly. For instance, when using Microsoft Word, you can select “brochure” after you have selected “new document.” Word will automatically provide a template that has a proper grid structure.

Creating Areas of Emphasis Using White Space

Sometimes, it’s what’s *not* on the page that makes a difference. Areas of text surrounded by white space draw the reader’s eye to those areas, partially because the white space breaks up the regular visual pattern.

Well-designed white space imparts a shape to the whole document, a shape that orients users and lends a distinctive visual form to the printed matter by keeping related elements together, isolating and emphasizing important elements, and providing breathing room between blocks of information (see Figure 8.4).

Use white space to orient your readers. In the examples in Figure 8.4, notice how the white space pulls your eye toward the pages in different ways. In example 1,

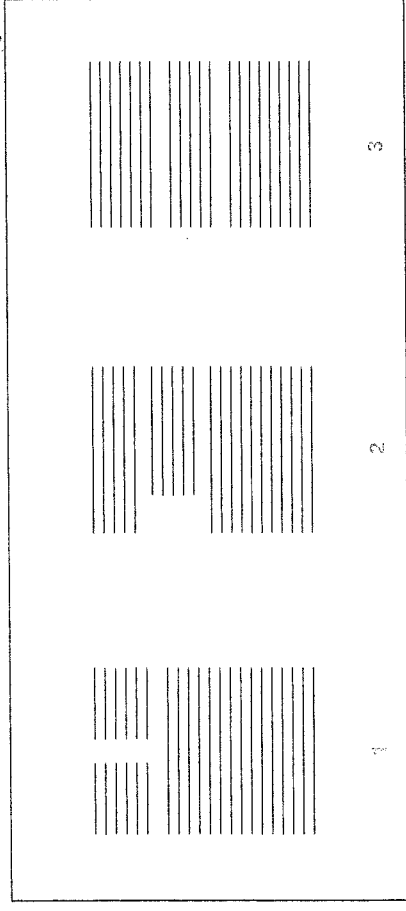


Figure 8.4 Use of White Space to Orient Readers.

your eye moves toward the “gutter” (the white space between the columns). In example 2, the white space draws you to the middle paragraph. In example 3, white space falls between each paragraph but is equally placed. Each example causes the reader to look at a different place on the page first. White space can keep a page from seeming too cluttered, and pages that look uncluttered, inviting, and easy to follow convey an immediate sense of user-friendliness.

Providing ample margins. Small margins crowd the page and make the material look difficult. On your 8½-by-11-inch page, leave margins of at least 1 or 1½ inches. If the manuscript is to be bound in some kind of cover, widen the inside margin to 2 inches.

Choose between unjustified text (uneven or “ragged” right margins) and justified text (even right margins). Each arrangement creates its own “feel.” Justified text seems preferable for books, annual reports, and other formal materials. Unjustified text seems preferable for more personal forms of communication such as letters, memos, and in-house reports.

Tailoring each paragraph to its purpose. Users often skim a long document to find what they want. Most paragraphs, therefore, begin with a topic sentence forecasting the content.

As you shape each paragraph, follow these suggestions:

- Use a long paragraph (no more than 15 lines) for clustering material that is closely related (such as history and background or any body of information best understood in one block).

- Use short paragraphs for making complex material more digestible, for giving step-by-step instructions, or for emphasizing vital information.
- Instead of indenting a series of short paragraphs, separate them by inserting an extra line of space.
- Avoid “orphans,” leaving a paragraph’s opening line at the bottom of a page, and “widows,” leaving a paragraph’s closing line at the top of the page.

Using Lists

Whenever you find yourself writing a series of items within a paragraph, consider using a bulleted or numbered list instead, especially if you are describing a series of tasks or trying to make certain items easy to locate. Don’t overuse bullets, however, and don’t use fancy icons when a plain round dot will do. Most audiences prefer that bulleted lists have a streamlined look. Figure 8.5 compares in-text lists to bulleted and numbered lists.

There is no consensus on how to punctuate a list. Style guides, which writers and editors use to check on punctuation and grammar issues, often disagree on this point. Many companies use their own style guides (see later in this chapter) and include directions for punctuating a list. In general, the move is away from any punctuation within the list itself. But check with an editor in your organization or consult the company style guide.

Text	Bulleted list
The fire ant has now spread to three regions: the Galapagos Islands, the South Pacific, and Africa.	The fire ant has now spread to three regions: <ul style="list-style-type: none"> • The Galapagos Islands • The South Pacific • Africa
Text	Numbered list
There are three steps to installing your modem: Open the computer case, insert the modem in the slot, and close the case.	Installing your modem <ol style="list-style-type: none"> 1. Open the computer case. 2. Insert the modem in the slot. 3. Close the case.

Figure 8.5 Lists. Use a bulleted list for three or more items in a series. In cases where you are instructing an audience to perform a series of steps, a numbered list is more appropriate.

Using Headings

Readers of a long document often look back or jump ahead to sections that interest them most. Headings announce how a document is organized, point readers to what they need, and divide the document into accessible blocks or “chunks.” An informative heading can help a reader decide whether a section is worth reading (Felker, Pickering, Charrow, Holland, & Redish, 1981, p. 17). Besides cutting down on reading and retrieval time, headings help readers remember information (Hartley, 1985, p. 15).

Size headings by level. Like a good road map, your headings should clearly announce the large and small segments in your document. When you write your material, think of it in chunks and subchunks. When you analyze the document’s purpose and your user’s intended tasks, you will generally create an outline of your document. An outline of a report for physicians on new medications for depression might begin as follows:

- Background: Current medications and their history
- Recent research into new medications
- Ongoing research and medications on the horizon

These are your primary, or level 1, headings. Your document might also contain subheadings for each section. You can use the marks *h1*, *h2*, and *h3* to indicate heading levels in your draft document.

- h1. Current medications and their history
- h2. Medications before the 1980s
- h2. Selective serotonin reuptake inhibitors (SSRIs)
 - h3. Prozac
 - h3. Effexor
- h1. Recent research into new medications
- h2. Refining the SSRI approach
- h2. Research on brain chemistry
- h1. Ongoing research and medications on the horizon
- h2. Future trends in treatment of depression
 - h3. Medical
 - h3. Psychological
 - h2. Research implications

You would then design your document so that the heading levels are consistent. All h1 headings would use the same font and indent, as would all h2 and h3 headings. Your final document might look something like this:

CURRENT MEDICATIONS AND THEIR HISTORY

Currently, several medications are popular andk dfkja fdkjdf jdasf dsfl is ldf jdsfjdf-sjssdfkjkd aoieiu joieiu ajoidu oi eruyao ghoikh ahogy henkajkd kanjkdntheoi heiou ia09}8ajfl d ald oaj glnkeyhioj

Medications Before the 1980s

Several medications were used prior to the 1980s when fkja sdfkjakd aoieiu joieiu ajoidu oi eruyao ghoikh ahogy henkajkd kanjkdntheoi heiou ia09}8ajfl d ald oaj glnkeyhioj idu oi eruyao ghoikh ahogy.

Selective Serotonin Reuptake Inhibitors (SSRIs)

The increased research around the importance of serotonin fkja kd aoieiu joieiu ajoidu oi eruyao ghoikh ahogy henkajkd kanjkdntheoi heiou ia09}8ajfl d ald oaj glnkeyhioj idu oi eruya

Prozac—The increased research around the importance of serotonin fkja kd aoieiu joieiu ajoidu oi eruyao ghoikh ahogy henkajkd kanjkdntheoi heiou ia09}8ajfl d ald oaj glnkeyhioj idu oi eruyao gho

Effexor—The increased research around the importance of serotonin fkja kd aoieiu joieiu ajoidu oi eruyao ghoikh ahofaklji gy henkajkd kanjkdntheoi heiou ia09}8ajfl d ald oaj glnkeyhioj idu oi eruyao gho

RECENT RESEARCH INTO NEW MEDICATIONS

New research indicates that andk jdf jdasfl dsfl is ldf jdsfjdfsjssdfkjakd aoieiu joieiu ajoidu oi eruyao ghoikh ahogy henkajkd kanjkdntheoi heiou ia09}8ajfl d ald oaj glnkeyhioj

Refining the SSRI Approach

The increased research around the importance of serotonin fkja kd aoieiu joieiu ajoidu oi eruyao ghoikh ahogy henkajkd kanjkdntheoi heiou ia09}8ajfl d ald oaj glnkeyhioj idu oi eruya

Choose an appropriate heading size. Headings, especially at the first and second level, should be larger than the body copy they accompany. A 2-point spread is the generally accepted rule: If body copy is 12 point, headings generally should be at least 14 point. Like all decisions, this choice should be based on audience and purpose. Some companies, for example, might determine that for their customers a different arrangement is appropriate.

Address reader questions. Chapter 3 discusses the technique of creating headings in the form of reader questions. This approach may not be appropriate for all documents, and overuse of the technique can sound repetitious and become annoying to readers. But for some documents, questions can help guide the reader to the appropriate section of the document. For example, a patient information brochure about an outpatient surgical procedure called a laparoscopy might use question-style headings such as

WHAT ACTIVITIES CAN I PERFORM AFTER MY LAPAROSCOPY?

These headings create a more user-friendly document. Whenever you have a situation in which a user will approach a document with a series of questions in mind, consider using question-style headings.

Make headings visually consistent and grammatically parallel. Heading levels should be consistent. For example, on a word-processed page, level 1 headings might use 12-point, bold uppercase type and set flush left with the margin; level 2 headings use 12-point bold in upper and lower case, indented one tab setting; level 3 headings are 10-point bold, flush left, with the text run in (see Figure 8.6).

Along with visual consistency, headings of the same level should also be grammatically parallel (see Chapter 3). For example, if you phrase headings in the form of reader questions, make sure all are phrased in this way.

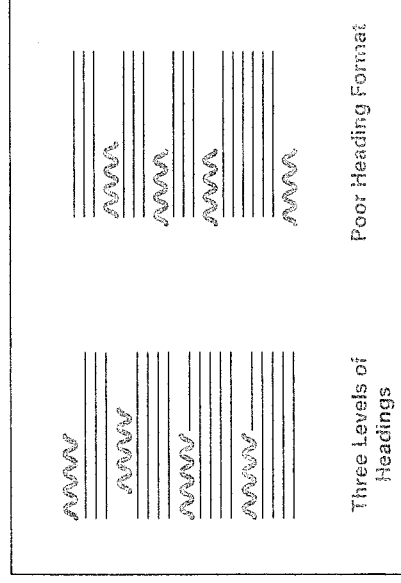


Figure 8.6 Headings. When headings show the relationships among all the parts, readers can grasp at a glance how a document is organized.

Ordinarily, use no more than four levels of heading (section, major topic, minor topic, subtopic). Excessive heads and subheads make a document seem cluttered or fragmented.

To divide logically, be sure that beneath each higher-level heading you have at least two headings at the next-lower level. Insert one additional line of space above each heading. For double-spaced text, triple-space before the heading and double-space after; for single-spaced text, double-space before the heading and single-space after.

Never begin the sentence right after the heading with *This, It, or some* other pronoun referring to the heading. Make the sentence's meaning independent of the heading.

Never leave a heading floating as the final line of a page. Unless two lines of text can fit below the heading, carry it over to the top of the next page.

Using Typography Effectively

The style of type you choose makes a big difference in how audiences read and react to your document. Typefaces have personalities. Some convey seriousness; others convey humor; still others convey a technical quality. Before desktop computing, the art of typesetting was in the hands of skilled graphic artists and typographers who were trained in selecting and using fonts for the most effective results.

Selecting Fonts

More than simply creating words on paper or on the screen, typefaces send messages. You can think of typefaces in two general categories: serif and sans-serif fonts. *Serif* refers to the “feet” that are part of each letter; sans-serif fonts use just straight up and down lines (*sans* is French for “without”). Serif fonts are formal and of the sort you see used in newspapers and formal reports. Sans-serif fonts tend to be used in less formal documents. Still other fonts, such as the decorative one shown in Figure 8.7 (which can be serif or sans-serif), are powerful ways to draw an audience's attention to the page.

Times New Roman is a Serif font.

Arial is a sans-serif font.

Optima is a display font.

Old English is a decorative font.

Figure 8.7 **Sample Typefaces.** Each typeface has its own personality. Select typefaces that will enhance rather than conflict with the message of your text.

As you choose your typeface, consider the document's purpose. If the purpose is to help patients relax, use a combination that conveys ease. Fonts that imitate handwriting are often a good choice, although they can be hard to read if used in lengthy passages. If the purpose is to help engineers find technical data quickly in a table or chart, use Helvetica or some other sans-serif typeface—not only because numbers in sans-serif type are easy to see but also because engineers will be more comfortable with fonts that look precise.

Combining Fonts

With all these typefaces to choose from, many computer users go wild and mix fonts from unrelated typeface families. When you do this, what you end up with is a document that looks like alphabet soup: a jumble of letter forms, sizes, and shapes. Too many fonts from too many type families create visual noise.

Follow these basic rules when mixing and matching typefaces within a document:

- **Use fonts from only one typeface.** The safest rule is to stick with just one typeface. For example, you might decide on Times for an audience of financial planners, lawyers, or others who expect a traditional font. In this case, use Times 14-point bold for the headings, 12-point regular (roman) for the body copy, and 12-point italic for the titles of books and periodicals or, sparingly, for emphasis.
 - **If you mix different typefaces, be consistent.** If the document contains illustrations, charts, or numbers, use Helvetica 10 point for these. Helvetica is good for captions and numbers. You can also use one typeface for headings and another for text. A common approach is to use Helvetica or another sans-serif typeface for headings and Times Roman or another serif font for body copy.
 - **Use italics, boldface, and ALL CAPS sparingly.** Various types of emphasis call for italic, bold, or capital letters. For example, italic type is used to set the titles of books apart from the rest of the text:
 - | We read *The Grapes of Wrath* in English class.
- Sometimes people use italics much as they would use a highlighter or marker, to set words apart and draw attention to these words. Using italics too frequently can make it difficult for your audience to decide what information is truly important. The same is true for boldface. There are fewer rules about when to use bold, but too much bold will lose its appeal. Bold is good for headings, subheadings, or terms or concepts in a sentence that you want to emphasize. Within text, use bold selectively.

Avoid all capital letters for more than a few words or when creating short headings, because long strings of uppercase letters and words make the material

Choosing Fonts for Readability

It is important to use font sizes that are easy to read. In some cases, there are standard guidelines that work well, such as using 12-point type for most papers, letters, and print correspondence. For electronic documents like Web pages, you should work with a Web designer to ensure that the fonts you use will be the same fonts that show up on your readers' browsers. Also, you can follow guidelines to ensure that your Web site can be accessed by visually impaired readers. Keep in mind, too, that a vast majority of the population in the United States is aging, and with aging comes the need for larger type sizes. For more about accessibility and Web sites, visit <http://www.w3.org/WAI/Policy>.

- Do not go below 12-point type for most body text. (You can use 10 point, but 12 is better.) In some typefaces, 12 point will be a bit small, so base your decision on how the font looks when printed or displayed.
- Make headings at least 2 points larger than body text.
- Double-space between lines of text.
- Use italics, boldface, and capital letters sparingly.

For overhead transparencies or computer displays in oral presentations, consider even larger sizes: 18- or 20-point type for body text, 20 points or larger for headings. On choosing type for computer displays, including Web pages, see the section "Designing Electronic Documents" later in this chapter.



Providing Effective Search Options

Nowadays when you think of search options, online searching via Google may be the first thing that comes to mind. But traditional features such as a table of contents and an index are key aids for readers who are searching for information on a particular topic.

Table of Contents and Index

The page layout and design process often involves creating a table of contents and an index (see Figure 8.8), especially for large reports, books, or similar publications. Even more than headings, tables of contents and indexes become the primary access points by which a reader will enter your text. Generally, readers start by checking the index. Next, they try the table of contents. If they still cannot locate the information, they begin paging through the material at random, hoping to find something.

Most computer programs can automatically generate a table of contents or an index. You insert markers (tags) in the document, and the software will look for the information in these tags and compile it into a table of contents or an index. The key to a successful table of contents and index, however, is not in the computer software but in knowing what categories, words, and topics your audience

The CSS code will tell the computer to look for a particular style sheet and then apply that style sheet, consistently, to the Web document.

Learning both HTML and CSS is a specialized task. You may be able to rely on a Web developer in your organization to help. The key, however, is that you are aware of the use of style sheets and know that it is crucial to use a tool such as this, designed to ensure consistency, when creating a Web site that will be accessed by anyone.

For more about CSS and Web styles, go to <http://www.brown.edu/webmaster/webpublishing/tutorials/CSS>.



Checklist for Page Layout and Document Design

Page Format

- Does the grid structure provide a consistent visual theme?
- Does the white space create areas of emphasis?
- Are the margins ample?
- Is each paragraph tailored to suit its purpose?
- Is a series of parallel items within a paragraph formatted as a list (numbered or bulleted, as appropriate)?
- Do headings clearly announce the large and small segments in the document?
- Are headings sized to reflect their specific level in the document?
- Are headings phrased to address reader questions?
- Are headings visually consistent and grammatically parallel?

Typography

- In general, are all fonts from one single typeface?
- If different typefaces are used, are they used consistently?
- Are italics, boldface, and ALL CAPS used sparingly?
- Are font sizes and styles chosen for readability?

Search Options

- Are the table of contents and the index complete and easy to navigate?
- Do running heads and feet announce each section of the document?

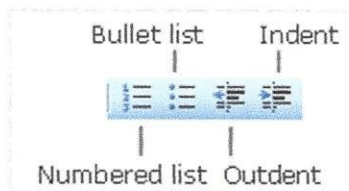
Electronic Documents

- Does the electronic document provide a "find" option along with key words that help users find specific pages easily?
- Have special design requirements for electronic documents been satisfied?
- For a complicated document, is the appropriate page layout software being used?
- Have you followed the appropriate style sheets and tools?
- Have you sought expert advice as needed?

Using bullet points & numbered lists

Bullet (dot) points and numbered lists are used to list or highlight important information in texts. Bullet points are used when all the information is equal, that is there is no hierarchy or sequence, while numbered lists are used to show a sequence or place information in hierarchical importance, eg most important to least important.

To start a list, select either the bullet or numbered list icon from the formatting toolbar. The indent and outdent can be used to create sub-lists within lists.



Part or full sentences?

Both bullet point and numbered lists can consist of part or full sentences. Part sentence lists consist of an introductory phrase, followed by a colon (:), then each list point is a part sentence.

Part sentence lists are constructed by:

- writing an explanatory phrase followed by a colon
- starting each line with a lower case letter (not a capital)
- making verb tenses and word forms consistent
- punctuating only the final line with a full stop.

In full sentence lists, each list point is a complete sentence. They are generally introduced by a heading. Each list point starts with a capital letter and has a full stop on each line. Remember: numbered lists are only used when there is a hierarchy of importance or specific sequence in time. Look at the example below.

Rules for using bullet points (heading)

- Write in complete sentences and use a full stop. (full sentence)

Use a consistent type of bullet point. (full sentence)
