

Chapter 8. Formatting Documents

In this Chapter

- Overview of the general standards for document formatting and the importance of using consistent, clear formatting.
- Tips and resources for how to use Microsoft Word styles and templates to simplify formatting.

Document formatting refers to the way a document is laid out on the page—the way it looks and is visually organized—and it addresses things like font selection, font size and presentation (like bold or italics), spacing, margins, alignment, columns, indentation, and lists. Basically, the mechanics of how the words appear on the page. A well formatting document is consistent, correct (in terms of meeting any stated requirements), and easy to read.

The **visual appeal** of a document has an effect on the reader and how they perceive the information, so it's important in any piece of writing or documentation to be concerned with its

formatting. Formatting also makes information more accessible to the reader by creating and labeling sections (headings), highlighting key words or ideas (bold, italics, or lists), and making a good impression (professional look and feel, appropriate font choice for the document type).

There are many ways to format a technical or professional document. Assignments may specify formatting requirements, but if a style is not dictated, maintain a clear and consistent format throughout the document.

Especially when combining work from multiple team members, details like slight differences in font size or line spacing are easy to miss, but these subtle inconsistencies detract from the overall professionalism of your document. Sloppy formatting will reflect poorly on your abilities, and your audience may lose confidence in your message.

Basic Formatting Standards for Lab Documents

A few standards that should be used in most lab documents, unless specified otherwise:

- 11-12 pt. font in a consistent style throughout, including headers, footers, and visual labels
- 14 pt font for section headings (and “Memo” or other document label within a header)
- A standard, professional font (e.g., Times New Roman, Cambria, Calibri)
- Single or 0.15 line spacing, with no indentation on the first line of the paragraph
- Additional line break between paragraphs

- Left-justified body text
- Page numbers at bottom right corner (starting the first page of the main text, i.e. not the cover page or Table of Contents)
- 1in. margins



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<https://ohiostate.pressbooks.pub/feptechcomm/?p=61>

[Writing Common Technical Documents](#) details the content for documents you are likely to write in first-year engineering. You should review these for what information should be included in headers, title pages, etc. Each content guide demonstrates the general formatting you might see in a document of that type, but these are not complete templates for formatting.

Using Features in Word

Using the built-in features in Microsoft Word can help maintain proper formatting even when you need to make changes to your document.

- Word's Equation Editor should be used for all equations and calculations (see [Using Graphics and Visuals Effectively](#) for more information on formatting equations, figures, and tables).

- All page breaks should use the Page Break option within Word. This ensures that proper spacing will be maintained regardless of changes to the surrounding text or file type.
- Many citation styles use hanging indents in the reference list. Word has an option to indent all lines in a paragraph except the first line. This is accessible under Paragraph Options and should be used for all reference lists that require hanging indents. This option will maintain your hanging indent if the text or font size is changed.
- Use the list formatting feature to ensure that the spacing and alignment are consistent throughout the doc. Note that when lists extend to more than one line, the text remains vertically aligned.

Using Templates & Styles

If a Word **template** is provided by your instructor, use it to create your document. Templates can be applied later, but it may be more difficult. Save the template as a document using your desired file name, then begin editing and adding content. Templates will often use features to simplify adding tables, figures, and a table of contents.

If a template is not provided, you can use a **style** to format your document. Word has many built-in styles that can be modified and saved. A style is a set of formatting that is applied automatically to the document as you create and modify it. It is likely that there will not be a style with exactly the characteristics you are looking for, but spending a few minutes to update the style will likely save time later by allowing you to easily add a Table of Contents, adjust Figure and Table labels, and move easily from section to section using the Outline feature. It is not

mandatory to use these features, but you may find them helpful, particularly for lab reports.

How-To Geek created “[Microsoft Word: Document Formatting Essentials](#),” a series of lessons on creating documents in Word.

More information on using paragraphs, sections, and characters within styles is detailed in “[Six Tips for Better Formatting in Microsoft Word](#).”

See the **Additional Resources** box below for links to more information on using Word effectively for formatting. If you are unsure of how to use a feature or find yourself spending an excessive amount of time manually making formatting changes, don’t be afraid to Google how to do something. Word is one of the most widely used programs in the world; there are many resources and tutorials online on how to use it. Know that many similar formatting features are also available in Google Docs.

Key Takeaways

- If formatting is not specified by your instructor, use the generally accepted standards for technical documents.
- Keep formatting consistent to minimize distractions and create a professional impression.
- Always use built-in tools like page breaks and indents to create documents.

- Consider using templates or styles to make consistent formatting easier.

Additional Resources

[A Design Procedure for Routine Business Documents \(OWL\)](#)

[Customize or create new styles in Word \(Microsoft\)](#)

[How to Simplify Word Document Formatting With Styles \(TutsPlus\)](#)

[How to Use, Modify, and Create Templates in Word \(PCWorld\)](#)