Typography exists to honor content
Typography must draw attention to itself in order to be read, yet in order to be read, it must relinquish the attention it has drawn. A traditional goal of typography is durability — durable typography is legible, but beyond that, it activates the page.

Letters have a life and dignity of their own
Well-chosen words deserve well-chosen letters; these in turn deserve to be set with intelligence, knowledge and skill. In a badly designed book, letters and words stand out unnaturally, making them difficult to read. Uneveness in lines of text are jarring and so what seems simple — the task of non-interference with letters — is actually quite difficult and designers spend hours and hours working out proper measure and reading gait.

Read the text before designing it

Discover the outer logic of the typography in the inner logic of the text
Does the text have a particular structure? What are the elements, for example is it broken down into sections with heads, are there footnotes, endnotes, lists, excerpts, captions? All of these things must be taken into consideration and it is best to do so before designing anything so that one considers all the elements of the text and how they will fit together.

Give full typographical attention to incidental details
Things like page numbers (folios), headers, footers — these are elements which can be made into beautiful typography, and are items that, when taken into consideration and carefully designed, set apart a well-designed text from a more typical rote way of flowing text in to a template.
Typesetting Checklist
by John Gambell, Yale University Printer

1 Replace all double spaces with single spaces. There should only be one space after terminal punctuation (., ? !) in text.

2 Make sure all quotation marks and apostrophes are ‘smart’ (eg. ‘ ’ “ ”) and not inch or foot marks (eg. ’ ”). In InDesign, the default settings usually place the correct marks automatically, but if you have to go in and make corrections manually, use:
   • “ open double quote = opt + [  
   • ” closed double quote = opt + shift + [  
   • ’ open single quote = opt + ]  
   • ’ closed single quote = opt + shift + ]  
   • (alternately: double-click the correct character in the Glyphs palette)

3 If possible (depending on the editor/author), use single quotation marks rather than double quotation marks throughout your document (as in the British convention). ‘Single quotes’ do the job and are less obtrusive than “double quotes”.

4 If double quotation marks are used, one should ‘hang’ them when practical and appropriate (eg. when the quotation mark starts a line). To do so in InDesign, highlight text in which quotes (and all other punctuation) needs to be hung. Choose Window > Type & Tables > Story. In the Story palette, click on Optical Margin Alignment and indicate in the box below the measure in points that the text should be moved to the left (the amount that should hang). Usually, it takes a bit of trial and error to get that measure to visually align.

5 Check hyphens, 1/m (or em), and 1/n (or en) dashes to make sure that they are properly used (hyphens for word breaks at the ends of lines and for hyphenated words; 1/m with ‘Thin Space’ either side – or 1/n with full space either side – for setting off phrases, 1/n for spans between numerals or time); then set them in the style you have determined for your text, paying attention to the kerning around the dash (should be thin spaces or as determined by the designer).
   • 1/m = opt + shift + hyphen  
   • 1/n = opt + hyphen  
   • thin spaces: a range of spaces of different widths can be found under Type > Insert White Space >  
   • Use your eye to determine the appropriate spaces you’d like to use around em/en dashes in the piece you’re designing.

6 Check kerning around dashes (as above), slashes, and italic/regular roman shifts as those shifts often result in uneven spacing.

7 Check for any initial abbreviations (eg. John F. Kennedy or J.J.) and adjust the spacing (kern) if necessary after period marks.

8 Check for all acronyms and set in small caps as determined by your text style. One should avoid the use of ALLCAPS in text; use true small caps instead, if available; or downsize the caps by .5pt to 2pt (you will have to visually determine the size depending on the typeface). Remember to always letterspace ALLCAPS slightly as they visually fill the space around each letterform more fully than lowercase letters – this means that you need to increase tracking to give the ALLCAPS letters a bit more breathing room. Treat ‘lining’ numbers in a similar fashion (see below). Approximately 30-70/1000 em tracking is a good range to stay within for letterspacing all caps, but it will ultimately depend upon the typeface you’re using and the effect you’re seeking to evoke.
• NOTE: if your typeface has true small caps (this style may be called expert), one accesses them via the lowercase characters. Expert styles often also contain old-style figures or OSF, or they may be found in the OpenType menu.

9a Check for all numerals within text and change to old-style figures (a.k.a. non-lining figures, text figures) if available in your typeface. If not, make an appropriate adjustment if lining figures appear to ‘pop’ out (i.e. appear too large) in the line (in the similar way that ALLCAPS may do so before adjustment) A small reduction of .5pt or .75pt size in the font often helps.

• NOTE: the preference for non-lining or old-style figures in reading text is a more traditional convention (Bringhurst discusses this); as a designer, you may prefer to use lining figures but be aware when you choose to do so and make it a conscious decision.

9b Adjust kerning of numerals if necessary. Lining numbers are often designed as monospaced characters (so that when set in columns, the figures will align vertically – this vertical alignment is useful when you’re working with numbers in tables for example). The number 1 compared to the number 8 for example often has too much space around it when it appears in text, so you should adjust for that.

10 Find and replace all ligatures if they exist in your typeface (fi, fl, ffi, ffl...). InDesign automatically places the fi and fl ligatures if they exist in your chosen typeface.

11 Use ‘true fractions’ eg. ½, ¼, ¾. These can be found in the glyphs palette in InDesign (under the Type menu). Do not however mix true and built fractions in the same text (eg. if your font has the fractions for ½, ¼, ¾ but not 3/8, 1/16 – do not mix these. Use built fractions eg. 1/2, 1/4, 3/8...).

• NOTE: fractions may appear in the OpenType menu for newer typefaces

12 Find all instances of italicized text (eg. book titles) and set in proper italics for your typeface or as determined by your text style. Check kerning in the space between italicized/roman shifts.

13 Set excerpted text as determined by your text style (eg. indented left and right margins) – and adjust for hanging quotes

14 Check for unintentional tabs in text (sometimes inserted by author or editor) – if your style is to indent paragraphs, make sure that they are done using proper first line indent and not by tabs (this is adjusted in the Paragraph palette by typing in the measure in points that the first line needs to indent). If your style is to start all paragraphs flush left using a line space (or preferably a fraction of a full-line space) to separate paragraphs, make sure the line spaces are all uniform.

15 It is traditional to start all first paragraphs after a heading or section break flush left. Start all paragraphs following excerpts flush left. Do not indent the first paragraph at these opening sections unless some particular feature of the design requires it.

16 Check carefully for loose lines and rivers in justified text blocks. Use tight but even word-spacing, especially in justified settings. In InDesign, approximately 93-97% ‘desired’ spacing in the Justification palette tends to work well. To adjust word-spacing, go to the Paragraph palette and choose Justification from the drop down menu.
• NOTE: only adjust word spacing percentages – do not adjust letter spacing or glyph scaling. You can start with the following settings, rather than InDesign defaults, and then adjust as needed: 85% ‘minimum’, 95% ‘desired’, and 110% ‘maximum’ (tend to work much better in general).

14 For text set ragged right, check and adjust lines that are too deep or areas that inadvertently give form to shapes that distract the eye. The goal is to have a rag that feels pleasantly random.

• NOTE: Ragged settings create margins which can only be ‘measured’ optically. A ragged typographic margin must be adjusted by trial and error in order that it appears to be equal in width to a flush margin.

15 Fix all bad line breaks:
   = ‘I’ at the end of lines should be pushed down to the next line
   = Fix any repeated stacked words at line beginnings or endings
   = Avoid a string of hyphens at line endings, in general it is best not to have more than 2 hyphens in a row at the end of lines. This can be adjusted automatically in InDesign by going to the Paragraph palette and choosing Hyphenation from the drop down menu. The following settings work a little better than InDesign default:
     • Words with at least 6 letters
     • After first 3 letters
     • Before last 3 letters
     • Hyphen limit 2 hyphens
     • Hyphenation Zone 3p0
     • uncheck Hyphenate Capitalized Words
     • uncheck Hyphenate Last Word
     • uncheck Hyphenate Across Column
   = Avoid a hyphen at the end of the last line before a page turn
   = Avoid a hyphen in a hyphenated compound word, eg. socio-political; instead, if you need to break the word, do so at the hyphen

16 Fix all widows and orphans

• NOTE: if adjustments need to be made on lines to either tighten or loosen, avoid increasing or decreasing tracking by more than 5-10/1000 em.

18 Consider increasing the tracking (letter spacing) of type set smaller than 9pt. This can help to improve legibility and appearance of most bold, italic and sans-serif faces. Conversely, consider tightening the tracking of large display sized type, especially when not using specifically drawn ‘display’ typefaces.

FOR HEADINGS:
19 Break heading material by sense (eg. after commas or between phrases); avoid setting conjunctions and prepositions on their own lines in headings

20 Eliminate unnecessary punctuation in headings, especially in display settings (colons and commas are often made redundant by line breaks or changes in style of heading material)

21 Adjust the baseline shift of parentheses, brackets, slashes, and quotation marks in headings so that they visually sit vertically centered with surrounding type.

22 SPELLCHECK !!