

## Obeying the rules

Over the centuries, typographic guidelines have been developed to provide consistency and competency within the profession, to preserve the beauty and legibility of typographic form, and to ensure that typography functions as often mandated: to clearly represent the thoughts of the author.

The guidelines presented...are not absolute or definitive, but they are representatives of a sturdy, time-tested collection of typographic “rules.” They are presented here to provide a context for informed typographic exploration. In other words, rules must first be understood before they can be broken. Once it is known how to obey rules, one can freely journey into unconventional terrain.

—Rob Carter

Working With Computer Type 4:  
Experimental Typography  
Rob Carter. 1997: RotoVision. p10.  
(Digital Color & Type)

# Rule1

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**For optimum legibility, choose classical, time-tested typefaces with a proven track record.**

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Well-seasoned typographic designers can usually count their favorite typefaces on one hand. Most often, they are those typefaces that are drawn and crafted with consistency among characters, and those that exhibit highly legible proportions.

(text)

(available on McNeal macs)

Baskerville	Baskerville (ITC New Baskerville)
Bembo	
Bodoni	(Didot)
Caslon	Adobe Caslon Pro
Centaur	(Adobe Jenson Pro)
Franklin Gothic	(News Gothic)
Frutiger	
Futura	Futura
Garamond	Adobe Garamond Pro
Gill Sans	Gill Sans
Goudy Old Style	Goudy Old Style (watch WS)
Helvetica	Helvetica Neue
News Gothic	News Gothic
Palatino	Palatino
Perpetua	
Sabon	(Adobe Garamond Pro)
Times New Roman	Times New Roman (“default”)
Univers	(Helvetica Neue)

(also appropriate)

Minion Pro

Myriad Pro (“default”)

**favor originals over ‘knock-offs’**

Helvetica (neue) over Arial

Palatino over Book Antiqua

## Rule2

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Be mindful not to use too many different typefaces at any one time.

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The primary purpose for using more than one typeface is to create emphasis or to separate one part of the text from another. When too many different typefaces are used, the page becomes a three-ring circus, and the reader is unable to determine what is and what is not important.

(text)



The role of typographic experimentation is to *extend the boundaries* of language by *freely* probing visual and verbal syntax and the relationships between word and image. **Syn-tactic** exploration enables designers to discover among typographic media an **enormous** potential to edify, entertain, and surprise. As in other forms of language typography is capable of *infinite expression*. The only limits to typographic discovery are those imposed by the designer herself.

## Rule3

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### Avoid combining typefaces that are too similar in appearance.

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If the reason for combining typefaces is to create emphasis, it is important to avoid the ambiguity caused by combining types that are too similar in appearance. When this occurs, it usually looks like a mistake, because not enough contrast exists between the typefaces.

(text)

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yes! same face:  
contrast through  
change of weight  
and posture.



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## Rule4

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**Text set in all capital letters severely retards reading. Use upper- and lower-case letters for optimum readability.**

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Lower-case letters provide the necessary visual cues to make text most readable. This is due to the presence of ascenders, descenders, and the varied internal patterns of lower-case letters. Using both upper- and lower-case letters is the most normative means for setting text type, and a convention to which readers are most accustomed. Upper-case letters can successfully be used for display type, however.

**distinct profile**

**UNIFORM PROFILE**



THE ROLE OF TYPOGRAPHIC EXPERIMENTATION IS TO EXTEND THE BOUNDARIES OF LANGUAGE BY FREELY PROBING VISUAL AND VERBAL SYNTAX AND THE RELATIONSHIPS BETWEEN WORD AND IMAGE. SYNTACTIC EXPLORATION ENABLES DESIGNERS TO DISCOVER AMONG TYPOGRAPHIC MEDIA AN ENORMOUS POTENTIAL TO EDIFY, ENTERTAIN, AND SURPRISE.



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yes!  
**U&lc** }

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## Rule5

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**For text type, use sizes that according to legibility studies prove most readable.**

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These sizes generally range from 8 to 12 points (and all sizes in between) for text that is read from an average distance of 12 to 14 inches. However, it is important to be aware of the fact that typefaces of the same size may actually appear different in size depending upon the x-height of the letters (the distance between the baseline and the meanline).

*So, 8 point AGaramond or Jenson will be too small, whereas 12 point Helvetica or Myriad will be too large.*

**8pt** The role of typographic experimentation is to extend the

**9pt** The role of typographic experimentation is to extend the

**10pt** The role of typographic experimentation is to extend the

**11pt** The role of typographic experimentation is to extend the

**12pt** The role of typographic experimentation is to extend the

**Adobe Garamond Pro** The role of typographic experimentation is to extend the boundaries of language by freely probing visual and verbal syntax and the relationships between word and image. Syntactic exploration enables designers to discover among typographic media an enormous potential to edify, entertain, and surprise.  
**10/12**

**Adobe Jenson Pro** The role of typographic experimentation is to extend the boundaries of language by freely probing visual and verbal syntax and the relationships between word and image. Syntactic exploration enables designers to discover among typographic media an enormous potential to edify, entertain, and surprise.  
**10/12**

**Helvetica Neue 65 Medium** The role of typographic experimentation is to extend the boundaries of language by freely probing visual and verbal syntax and the relationships between word and image. Syntactic exploration enables designers to discover among typographic media an enormous potential to edify, entertain, and surprise.  
**10/12**

## Rule6

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**Avoid using too many different type sizes and weights at the same time.**

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You only need to use as many different sizes and weights as needed to establish a clear hierarchy of information. Josef Müller-Brockmann advocates using no more than two sizes, one for display titles and one for text type. Restraint in the number of sizes used leads to functional and attractive pages.

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### Type and experiment

most restrained:  
use of space only  
to create hierarchy

no typographic contrast

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### Type and experiment

2 levels of hierarchy:  
display and text  
definite, pronounced,  
contrast

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### Type **and** *experiment*



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## Rule7

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Use text types of book weight.  
Avoid typefaces appearing too heavy or too light.

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The weight of typefaces is determined by the thicknesses of the letter strokes. Text typefaces that are too light cannot easily be distinguished from their backgrounds. In typefaces that are too heavy, counterforms diminish in size, making them less legible. Book weights strike a happy medium, and are ideal for text.

Helvetica Neue Ultra light



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Gill Sans Extra Bold



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Minion Pro Regular

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## Rule 8

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**Use typefaces of medium width. Avoid typefaces that appear extremely wide or narrow in width.**

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Distorting text to make letters wider or narrower by stretching or squeezing them with a computer impedes the reading process. The proportion of such letters are no longer familiar to us. Well designed type families include condensed and extended faces that fall within accepted proportional norms.

### Eurostile Condensed

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### Eurostile Medium

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### Eurostile Extended 2



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### Minion Pro Regular 75% horizontal scale



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### Minion Pro Regular 125% horizontal scale



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Rob Carter. **Digital Color & Type** 'obeying the rules' (ch6 pp148-161)  
[**Experimental Typography**; ch1 pp10-21]

presentation by CWaldron GD|UM 2005-2007

# Rule9

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**For text type, use consistent letter and word spacing to produce an even, uninterrupted texture.**

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Letters should flow gracefully and naturally into words, and words into lines. This means that word spacing should increase proportionally as letter spacing increases.

**normal:  
good letter & word spacing**

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**wide letter spacing  
narrow word spacing**



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**narrow letter spacing  
wide word spacing**



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## Rule 10

**Use appropriate line lengths. Lines that are too short or too long disrupt to reading process.**

When lines of type are either too long or too short, the reading process becomes tedious and wearisome. As the eye travels along overly long lines, negotiating the next line becomes difficult. Reading overly short lines creates choppy eye movements that tire and annoy the reader.



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acceptable line length is  
based on *cpl*  
—characters per line—

above: >75 too long  
same line length, larger type  
< 70cpl is okay

here:  
too narrow, especially if  
justified!

right:  
smaller type, greater *cpl*  
acceptable

ideal:  
≈45 *cpl* (justified columns)  
up to 70–75*cpl* for single  
column work (like a novel)



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# Rule11

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**For text type, use line spacing that easily carries the eye from one line to the next.**

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Lines of type with too little space between them slow the reading process; the eye is forced to take in several lines at once. By adding one to four points of space between lines of type—depending on the specific nature of the typeface—readability can be improved.

**12/13.5** The role of typographic experimentation is to extend the boundaries of language by freely probing visual and verbal syntax and the relationships between word and image. Syntactic exploration enables designers to discover among typographic media an enormous potential to edify, entertain, and surprise.

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**12/16** The role of typographic experimentation is to extend the boundaries of language by freely probing visual and verbal syntax and the relationships between word and image. Syntactic exploration enables designers to discover among typographic media an enormous potential to edify, entertain, and surprise.

**x-height, optical size influence line spacing (leading) requirements.**

*compare:*

**Centaur 12/12**  
“set solid”

vs

**Didot 12/12**  
(note crashing)

vs

**Helvetica Neue 12/12**

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**(more on line spacing, known as ‘leading.’)**

Digital typesetting applications (Quark, InDesign, Illustrator) default to 120% “auto leading” (baseline to baseline).

This means that 10pt type will be set with baselines 12 points apart (vertically); 12pt type at 14.4.

Auto lead settings are identified by parentheses around the numbers (14.4 pt)

>>>>>>

Always override the ‘auto’ setting by selecting or typing the leading you want (even if it is the same amount) to ensure consistent line spacing. Auto leading, because it ‘flexes’ with the character, has the potential to vary.

**warning!**

InDesign treats leading as a character attribute, rather than paragraph attribute. Therefore, to adjust leading of an entire paragraph, you have to highlight the entire paragraph.

or, you can change the preferences:

InDesign>Preferences> Text (or Type) >

Apply leading to entire paragraphs

**more on line spacing,  
specific to assignment**

**Z.1**

With column work, baselines must align horizontally.

This limits ‘space before’ and ‘space after’ settings to multiples of the leading

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**6pt space between paragraphs causes mis-alignment of baselines**

# Rule12

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For optimum readability, use a flush left, ragged right type alignment.

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Although in special situations, other methods of type alignment (flush right, ragged left; centered, and justified) are acceptable, the trade-off is always a loss—however slight—in readability.

FL/rr

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FR/l

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justified

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NEVER use  
'force justify'

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centered

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## Rule13

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### Strive for consistent, rhythmic rags.

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Avoid rags in which strange and awkward shapes are formed as a result of line terminations. Also avoid rags that produce a repetitious and predictable pattern of line endings.

The purpose of effective rags is not only to achieve aesthetic beauty. When rags consist of line endings that are carefully articulated, rhythmic, and consistent, they enable readers to move gently and effortlessly down a text column. Rags provide logical points of departure from one line to the next.

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## Rule 14

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**Clearly indicate paragraph, but be careful not to upset the integrity and visual consistency of the text.**

---

The two most common means of indicating paragraphs are by indenting or inserting additional (vertical) space between paragraphs. It is not necessary to indent the first paragraph in a column of text.

**standard typographic**

**indent is 1–2 ems**

*(An em is a horizontal distance equal to the point size of the type)*

**avoid**

**'amateur conventions' of half-inch indent, and indent of 1st ¶**



**extra ("white") line**

**alternatives**

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## Rule15

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**Avoid widows and orphans whenever possible.  
(or, more humanely, take care of them!)**

---

A widow is a word or very short line at either the beginning or the end of a paragraph. An orphan is a single syllable at the end of a paragraph. (*note: you will find quite a variety of definitions of these terms*) Both of these lonely conditions should be avoided whenever possible, for they destroy the continuity of text blocks, create spotty pages, and interfere with concentration in reading.

Whether a single word at the end of paragraph is objectionable is dependent on context. In narrow columns, a multi-syllabic word might be sufficient to hold its own line.

On the other hand, in a wide measure, two very short words might not be enough.



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**solution : try adjusting rag,  
or *slight* negative tracking  
(-20, or 1/50th em)**

## Rule16

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### Emphasize elements within text with discretion and without disturbing the flow of reading.

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Never overdo it. Use minimum means for maximum results. The ultimate purposes for emphasizing elements within text are to clarify content and distinguish parts of information

#### italic

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#### sans/bold

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#### color

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#### small caps

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#### too much!



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## Rule17

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Always maintain the integrity of type. Avoid arbitrarily stretching letters.

---

Well designed typefaces exhibit visual qualities that make them readable. Letters are painstakingly designed with specific proportional attributes in mind. Arbitrarily distorting them compromises their integrity.

Eurostile Bold

E



Eurostile Bold  
145% horizontal

E

Eurostile Bold Extended 2

E

Eurostile Bold Condensed

E



Eurostile Bold  
55% horizontal

E

## Rule18

---

Always align letters and words on the baseline.

---

Letters are designed to coexist side-by-side on an invisible baseline. When they stray from this orientation, they appear to be out of control, their readability greatly compromised.

VERTICAL TYPE SHOULD RUN ALONG A ROTATED BASELINE, NOT STACKED!

vertical type should run along a rotated baseline, not stacked!

n o  
s t  
a c  
k i  
n g  
!



# Rule19

**When working with type and color, ensure that sufficient contrast exists between type and its background.**

Too little contrast in hue, value, or saturation, or a combination of these factors, can result in type that is difficult, if not impossible, to read.

standard contrast  
greatest legibility

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black on red  
much lower value contrast



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insufficient value contrast



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value contrast improves  
legibility

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high hue contrast (vibrates!)  
close value



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high hue contrast (vibrates!)  
close value



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---

more on type and color.

---

greater legibility  
with contrast in

value

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value

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hue and value

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value

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black on  
mid-value, high chroma  
cyan

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tint of cyan on  
middle-value green

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# Rule20\*

**Always use professional typesetting punctuation and spacing standards.**

Many well-known practices are rooted in the limitations of typewriters and carried over into word processing and desktop publishing. Professional typesetting conventions use the full range of character sets and proportional spacing built into digital type.

## Typographers' Quotes

“serif face quotation marks”

“sans-serif face quotation marks”

"dumb/amateur/WP quotation marks"

"dumb/amateur/WP quotation marks"



## Apostrophes

Apostrophes v single quotes:

'07 not '07

’

“”

opt shift ] opt ]

opt [ opt shift [

apostrophes indicate –missing characters  
–possession

'60s

stop 'n' go

Harry's dog

'tis the season

'cause I said so

- InDesign >
- Type >
- Insert Special Characters >
- Quotation Mark >
- Single Right ...

\*beyond Carter : WALDRON RULES

Rob Carter. **Digital Color & Type** 'obeying the rules' (ch6 pp148-161)  
[**Experimental Typography**; ch1 pp10-21]

presentation by CWaldron GD|UM 2005-2007

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---

## Primes

On the other hand, do not use quotation marks for inch/feet (degrees/seconds, etc) marks, which are properly indicated with primes.

## vertical primes

final design is a 20" x 14" spread (20" = 1' 8")

[glyph palette](#), or CS3 update: Control ' (^) Control " (^⇧)

## angled primes

final design is a 20" x 14" spread (20" = 1' 8")

[Symbol font > glyph palette](#)

[Apple Symbols > glyph palette](#)

## Dashes

**-hyphens—em dashes—en dashes**

hyphens

connect split words and compound words

My mother-in-law came to dinner on Saturday evening and brought wine.

em dashes

set off phrases —like a comma—to separate stand-alone ideas, or parenthetical comments.

en dashes

substitute the word 'to' or 'through' or 'until' to indicate a range:

this class meets 8:30–11:30

hyphen

- (hyphen key, to the right of zero)

en dash

– option -

em dash

— option shift - (“capital en!”)

you will find varied æsthetics of use (space around) —you may need to kern one side of en dashes, depending on the numbers

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Rob Carter. **Digital Color & Type** ‘obeying the rules’ (ch6 pp148–161)  
[**Experimental Typography**; ch1 pp10–21]

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## Rule20\**continued*

---

Always use professional typesetting punctuation and spacing standards.

---

*a few more things...*

**word spaces**

Only use one space after a period

(the convention of a double space is a hold over from the monospace limitation of typewriters.)

**tabs, indents**

**“The space bar is not a design tool.”** —Ellen Lupton (p164)

All indents and tabulated spacing should be set with ‘Tabs’ (Layout > Tabs) and formatting ¶ palette (or ¶ style sheet) — do not use the space bar (except for word spaces!)

**Paragraph styles**  
**Character styles**

Use Paragraph Styles and Character Styles to ensure consistency and make type selection changes efficiently.

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---

Always use professional typesetting punctuation and spacing standards.

---

*oh, and another thing...*

**Hanging Punctuation**

**Optical Margin Alignment**

InDesign :  
Window  
>type & tables  
> story   
<type size>

'60s  
stop 'n' go  
Harry's dog  
'tis the season  
'cause I said so

What do you  
think about  
snow in April?

What do you  
think about  
snow in April?  
That's not nice

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## Rule20\**continued*

---

Always use professional typesetting punctuation and spacing standards.

---

Illustrator : *...more on optical alignment*

### Optical Margin Alignment

select type object ↗

Type >

Optical Margin Alignment

“What do you think  
of snow in April?”

What do you think of  
snow in April?

#@\*!&?

That’s not very nice!  
“That’s not very nice!”

none

“What do you think of  
snow in April?”

What do you think of  
snow in April?

#@\*!&?

That’s not very nice!  
“That’s not very nice!”

optical margin alignment

### Roman Hanging Punctuation

paragraph ⌚

✓Roman Hanging Punctuation

“What do you think of  
snow in April?”

What do you think of  
snow in April?

#@\*!&?

That’s not very nice!  
“That’s not very nice!”

roman hanging punctuation

“What do you think of  
snow in April?”

What do you think of  
snow in April?

#@\*!&?

That’s not very nice!  
“That’s not very nice!”

optical margin alignment +  
roman hanging punctuation

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# Rule21\*

—*well, a suggestion, really*

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In text settings, use text figures (or “proportional Old style” figures) when available (open type, or OSfigures included in Small Cap fonts).

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## Figure styles

### tabular lining

0 1 2 3 4 5 6 7 8 9 0 *monospace, cap height*

### tabular old style

0 1 2 3 4 5 6 7 8 9 0 *monospace, U/lc*

### proportional lining

0 1 2 3 4 5 6 7 8 9 0 *proportional space, cap height*

### proportional old style

0 1 2 3 4 5 6 7 8 9 0 *proportional space, U/lc*

## InDesign

 character palette (far right)   
Open Type > (bottom section)

Character Styles > Open Type Features > Figure Styles  
Paragraph Styles > Open Type Features > Figure Styles

Open Type fonts feature  symbol in the font preview palette,  
or the format is identified in  
Font Book : Preview > Show Font Info (⌘ I)

## Illustrator

Open Type palette  
(behind character palette, or Window > Type > Open Type  
Figure: <pull down menu>

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