

Guide to Matching Type

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These are instructions to match headlines, body type, and logotypes. Since computers have taken over the typography duties for designers, the once common knowledge of how to match type with a well worn gauge and a mug of decaf has fallen into semi obscurity. This is partially due to the fact that the once typographer has now morphed into a typographer-retoucher-illustrator-prepress-designer, because of that very design computer that we love so much. We just don't have the time any more to learn all of the tricks of the trade that yesterday's design pros used.

But the need to match type hasn't gone away, clients still seem to be providing the designer with dusty clippings and yellow Post-It notes attached with the words "match this." And not only has the job become more difficult because of the increased workload of the graphic designer, but it has also become more complicated because that dusty sample that the client provided may have been manipulated in several hundred different ways by a another well-meaning designer. Samples of the old days were generally simpler to match because the hardware used to produce them were simpler. Now, Adobe Illustrator allows type to be distorted, skewed, twisted and modified, and an average Quark XPress operator may have several thousand fonts at his or her disposal. So what's a designer to do?

Fret not. First, size up your job, by giving the sample a critical eyeball, and try to get into the mind of the person that made it. Did they do a careful job of setting the type, or is it amateurishly done? This is an important question to ask, because often times, it makes no sense to attempt to match poor typography exactly, instead it may be better to capture the feel of the original piece. Is the piece carefully designed or does it seem to be more organic, and less structured. Again, this is an important question to ask because tightly designed pieces are generally easier to match -- there are fewer fonts used on a page, the sizes and spacing are rigorously controlled. By contrast, a more 'organic' piece may be nearly impossible to match, and the best option may be to capture the look of the original and then make an equally organic new design.

After you've sized up the piece, decided what you want to match first, if you need to match more than one element of the document. I think it's usually best to start with the body type, then go to the heads and subheads, then tackle the design elements, and finally do the logotypes. This gets the bulk of the work out of the way quickly, and then after you, the designer, are warmed up, you can get to the more difficult-to-match portions. Sometimes you may only need to match a logo or a head however..

MATCHING HEADS, SUBHEADS & CALLOUTS

First try to match the font used by comparing it to your type sample book. This can take a while to find the right font, but after you've done it for a few years, you'll start to get pretty good at recognizing the subtle 'fingerprints' of most fonts. If you can find the exact font, find something close, and relax, because most of the time, the client doesn't care if it matches exactly, as long as your choice of font is consistent through the project, and the size, weight and 'flavor' of the font match the sample. Remember while you are trying to find a matching font that the designer of the original piece may have altered the type somewhat by applying skew or horizontal scaling.

Next, type the exact same thing as your sample into your layout or art program. You obviously are not going to deliver the same (old) words to your client, but by typing the sample into your computer it will make it easier to match. After you've made the match, you will change the old words to the new ones. Next, grab your type gauge and use the E-scale to measure the font size. Galaxy Gauges provide an upper-case E and a lower-case x. Use either the san-serif or the serif E-scale to measure the type, and try to measure on a non-descender (like a lower-case g) or a non-round character (like an o), because these characters do not have a standard x-height. This measurement will be a rough, and you may have to make further adjustments later. Adjust your size to match in your layout or art program. Next, measure the line width of your sample, using the most precise gauge you have, generally the points gauge. Put a rule on your screen and adjust either the size, spacing (tracking) or horizontal scaling of your type to match your sample. (Generally, adjust your spacing first, then your size, then your scaling.) Print out a copy, compare to your sample by

strategically folding either the height or width of your printed copy over your sample and compare, or use a light table. Decide what you want to change if necessary, adjust your type, print a new copy, compare and keep repeating the process until you get as close as necessary. For this process, rather than measure, some designers like to scan their sample in and make a template on the screen. This is a good method for complicated type treatments, but you'll probably still have to measure and print out a sample, because the size shifts a bit during scanning. We have found that scanning in a template is most useful for logotype design, but for headline and type matching, it generally eats up more time than it saves. Finally, change your sample copy from the old words to the new words, and you're done.

MATCH BODY TYPE

This process is much like matching heads, but it requires a bit more precision because a tiny difference on a long document can mean an extra page or even tens of extra pages of copy. Again, try to match the font, which will be more difficult now because of the smaller size. Remember though, that most designers only use a handful of fonts for body copy, so you will most likely just need to focus your search to a few standby serif faces and an even fewer number of rare san-serif faces used for body type. If you can't match it exactly, don't worry, because you can adjust the spacing and (slightly) the horizontal scaling of your type to match the sample. When the type is small, slight differences do not become that apparent. Still, a magnifier will probably be useful to help you match the font.

Retype the first one or two paragraphs of your sample in order to make the matching process easier. Again, try to match the size using your E-scale, but remember that matching small sizes is difficult and you will probably need a printed sample or two to get the size and spacing (tracking) exactly right. Next, measure the line width of your sample, and remember that due to line breaks, any width that you measure will always be shorter than the column width that you have to set in your design program, so measure the widest line that you can find in the sample and then add a few points.

Generally, you should round to the nearest simple column width (i.e. 20 picas, or 30p6) because most designers like to use round numbers. Then measure your sample's leading and set that too. Adjust the tracking and — if necessary — your horizontal scaling to make the line breaks match. (Body type is rarely horizontally scaled more than a few percent.) Compare your line breaks, print a copy, compare to your sample, adjust, repeat as necessary. You may sometimes need to type in more than two or three paragraphs to get the body type to match exactly, and remember that you shouldn't always assume that the line breaks will match your line breaks, because often times, designers will insert manual line breaks, and adjust the hyphenation settings of their document. Hyphenation and justification settings, by the way, are notoriously difficult to match. For this, it is best find a setting that you like, and use that, because lots of designers just use the 'out-of-the-can' H&J settings, and your carefully-thought-out settings may look a lot nicer.

If you are still having a hard time making your body type match the sample, you may need to play with the spacing and horizontal scaling, and sometimes shave a few points off of the leading and size. This is because a designer may

prefer nice, round numbers, but when new copy is added, the designer is often forced to 'cheat' the size and leading a bit to make things fit. In these cases, after you make everything fit, take the 'cheats' out of the size and leading, because you may be forced to put your own cheats back in later. For instance you may find that a setting of 11.95 points over 13.86 points leading matches the sample exactly. When you put your own copy into your freshly matched type though, change the size and leading to the (most likely) intended size of 12 over 14. Again, remember to take out the sample copy and put in the real copy. This is an important step, because most clients don't realize that 90% of the work in setting a page is in matching the type, and when you provide them with a page which has the exact same copy as their sample, they usually freak out and think you just wasted a lot of time. Of course you didn't waste a lot of time, because getting in the correct copy, once you have the perfect type settings only takes a few minutes. But the designer's perceived skill (and pay) is often connected with these little things.

MATCH LOGOTYPES

This is the toughest matching job, because logotypes are notoriously massaged, tweaked, twiddled, and hyperconglomerated (not a real word, but it works here) to make somebody, somewhere happy. Unless your client needs the logo redone, most designers just scan in the supplied logo and use that, but sometimes, recreation is necessary. For this job, call out the big guns, turn on your scanner and scan the sample in as a 72 dpi grayscale file at about 8-inches or so. Bring the file into Photoshop (if necessary) to adjust out the tonality, bring up the contrast, take out the background and do whatever you

need to do to make a useful template. Save the file as a PICT or TIFF file and import into Illustrator. Don't attempt to create the logo in Photoshop or XPress, because they're not the right tools for the job. If your logotype is one of the those new fancy-shmancy dimensional logos, you can add that later in Photoshop, but your original logo needs to be in the correct, outline format, because after the 'dimensional trend' has passed, you will need a nice, clean outline format again.

So again, import the template into Illustrator, and use this as your guide. Find a font that matches as closely as possible, with the knowledge that you will most likely have to adjust the letter forms manually at some point. Again, match the size, spacing and effects, but this time, match to the sample template on the screen instead of measuring the printed sample. If you have a complicated logotype to match, you may need to make a larger template, so scan it in at about 20-inches instead, and zoom in and out of the template while you are creating the new logotype.

Resist the temptation to do an autotrace or Streamline on the scan here, instead chose to redraw it if at all possible, because your carefully redrawn piece will most likely come out smoother than one of the 'point heavy' auto-trace shapes out of Streamline or Illustrator's autotrace. Of course if your logotype has some very complicated shapes, and your client's budget doesn't allow you the time to redraw everything, you may need 'autodraw' parts of the logo, maybe redoing just the type for instance. Remember though that cleaning up 'autodraw' logos can sometimes take more time that just drawing them from scratch, with none of the artistic satisfaction.

When you are ready to convert your type to outlines to continue the adjusting process, make sure you convert A COPY OF THE ORIGINAL type, because you may need to either come back to the unconverted type or someone down the line may need to know what font you started with. So, convert it to outlines, and adjust the shapes and points to match your template. When you are satisfied with your work, measure your sample piece and then scale a copy of your on-screen work to the finished size for comparison to your sample. (You can save all of the unconverted type and unscaled art in another file.) When scaling, make sure that you scale your line weights as well as your art work (this is a setting in the preferences) so that your hard work isn't ruined on scaling. Print out your work, compare to your sample and adjust if necessary.

If you follow this process, you will usually find your work spot-in because you have been working at a high magnification of the original work. If necessary, add in color or grays to your logo to match the sample.

Save your work as an EPS or PDF file, and you are done, UNLESS you need to add special effects to your logo, like dimensional effects in Photoshop. If you do need to continue working on your logo in Photoshop, work on a copy, do not save over all of your hard Illustrator work. And these instructions will work (with some slight adjustment) for other illustration programs like Freehand, Corel Draw and Canvas. Illustrator, Photoshop and Xpress are the industry standard programs however. If you are using InDesign, you can do a lot of this work directly in that program.